Trade and Industry

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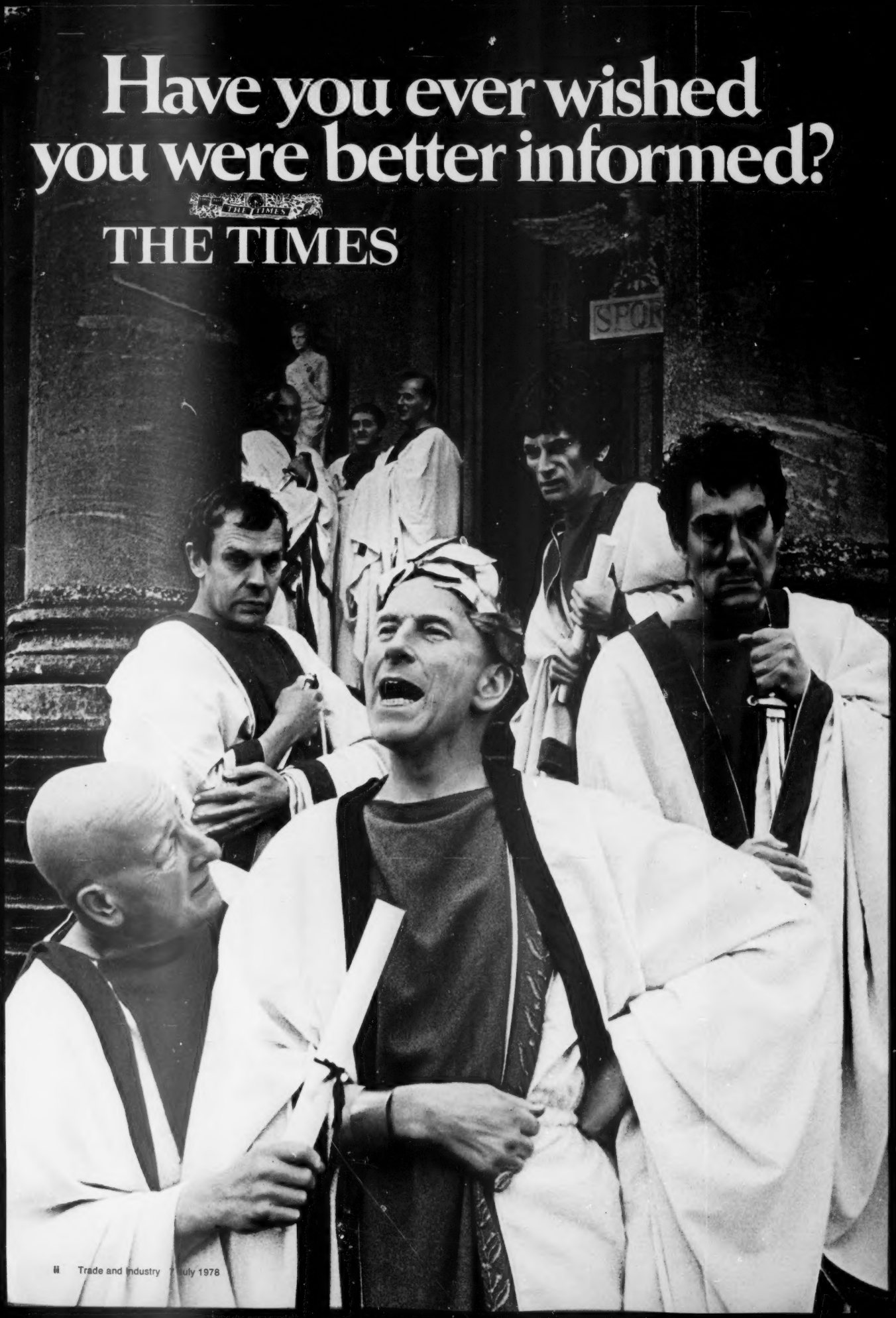
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Trade and Industry

7 July 1978

News from the Departments of Industry·Trade·Prices & Consumer Protection

With a view to stimulating a multi-million pound micro-processor industry, the government has set aside an initial £15 million (see page 2). Picture shows the 'clean room' at ICL's new microcircuit design and processing facility at Manchester.

Trade and Industry

Incorporating the Board of Trade Journal
Volume 32 no. 1

Pages 1 to 60. 7 July 1978.

Price 40p. Every Friday.
Annual subscription including postage £30.60.
Overseas airmail rate £42.40.

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Subscriptions: HMSO, PO Box 569, London SE1
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ABC Member of the Audit Bureau of Circulations
ISSN 0006-5323

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Trade and Industry this week

HOME

Boost for micro-processors in industry

A scheme to encourage UK industry to apply micro-processor techniques to a wide range of products and production processes was announced by Eric Varley, Secretary of State for Industry, on Tuesday.

Answering a parliamentary question, he said that his department was introducing an interim micro-processor application project (MAP), to which an initial allocation of £15 million had been made under the Science and Technology Act 1965. Assistance under the scheme would be provided on a selective basis to all sectors of UK manufacturing industry including those sectors which were eligible for assistance under section 8 industry act schemes. The new micro-processor scheme would complement other existing government support for the micro-electronics industry and for computer hardware and software; the terms of support under the scheme would take account of weaknesses in UK industry which were clearly emerging from discussions on the government's industrial strategy. Companies in receipt of assistance under a section 8 scheme would not be eligible for additional assistance under MAP for the same project.

Assistance would be available under:

Industrial awareness and training: in the context of the MAP, the Department of Industry would be alerting industry to the potential of micro-processors and utilising the services of existing industry training bodies and educational institutes. Appropriate training courses with national coverage would be expanded – details would be made available in due course.

Feasibility studies and consultancy support: a refund of up to £2,000 of the cost of consultancy work would be made to companies seeking professional advice on the potential for micro-processor installations and processes within their own manufacturing units or for the incorporation of micro-processors in their end-product design.

Micro-processor application support: this would take the form of financial support for actual projects, involving the application of micro-processors, whether or not preceded by specific consultancy assistance under the scheme. Assistance will be available both for application of micro-processors in end-products and for their use in production processes.

Guidance for applicants would be published shortly and further announcements concerning extensions or modifications to the scheme would be made by the department in due course.

Mr Varley added that he would be making a fuller statement later this year when the government had had the opportunity to consider the report by the ACARD working party on the applications of solid state technology.

Big response to energy scheme

Department of Industry energy conservation scheme is attracting 500 inquiries a day.

Les Huckfield, Parliamentary Under-Secretary of State for Industry, spoke of the interest being shown in the scheme when speaking at the inaugural meeting of the Norwich energy managers' group, on Tuesday.

'The scheme is promising to be a success', he said. 'Since it was announced on 13 June we have received over 5000 inquiries and they are still coming in at a rate of 500 a day. This scheme provides selective financial assistance for more efficient heating by industry and commerce and I urge individual organisations to take advantage of this government support as soon as possible.'

The scheme would help speed up the government's approach to the £370 million per annum savings – an assessment of potential energy conservation savings based on direct evidence from industry.

'The energy-intensive industries may already be highly energy efficient but the small to medium user may be less aware of the potential of energy savings and less able to do something about it,' Mr Huckfield said.

UK acts to save fish stocks in UK waters

Further measures to conserve fish stocks in UK waters were announced by Minister of Agriculture, Fisheries and Food, John Silkin in the Commons on 3 July.

He said that the government had sought the European commission's approval, in accordance with agreed procedures, to the following measures which were necessary to conserve fish stocks within UK fishery limits.

Firstly he announced a ban on all direct fishing for herring within UK fishery limits off the West of Scotland (ICES area VIa) with the exception of the Clyde stock, to come into effect on 6 July. Secondly a reduction in the maximum permitted by-catch of protected species in small-mesh fisheries from 20 per cent to 10 per cent by weight, with the exception of nephrops fisheries, to come into effect within UK fishery limits on 11 July. Thirdly he announced an extension for the period from 1 October to 31 March of the eastern boundary of the current prohibited area for Norway pout fishing from the Greenwich meridian to 2 degrees east in waters under UK sovereignty or jurisdiction; and finally the prohibition in all waters within UK fishery limits of the use of nets of less than 70 mm mesh for fishing for nephrops from 1 November.

He said that the commission's approval might be sought for further measures considered by the government to be necessary for the conservation of fish stocks in waters under the sovereignty or jurisdiction of the UK. In this context the government was considering the need to strengthen existing provisions on the enforcement of the minimum mesh size regulations including carriage of nets of more than one mesh size and the need to regulate herring fishing in the Irish Sea.

North sea oil hits invisible accounts

The recent reduction in the net monthly invisible trade surplus to £120 million is mainly the effect of north sea oil developments on the UK's invisible accounts says Sir Francis Sandilands, chairman of the committee on invisible exports, in the committee's 1977-78 annual report published on Tuesday. Britain not only had to pay for foreign services in extracting the oil, but also had to borrow foreign capital to do so. The imported services alone, he said, were estimated to be costing the UK £500 million a year; and the earnings of foreign oil companies in the north sea were now rising significantly. As a result, while the beneficial effects of north sea oil would be reflected in import saving and export earnings on the visible trade figures, the detrimental results would be seen on the invisible accounts.

Sir Francis continued, that it was expected that the development of north sea oil fields, and the consequent reduction of oil imports, would eventually produce a sustained surplus in the balance of payments. How large and how long-lasting the surplus would be depended on domestic policies, and it could be dissipated even before the oil flow reached its peak. If used wisely, however, north sea oil could give a long period of freedom from the balance of payments constraints of the past 30 years, and so open up increased domestic investment, in all sectors of the economy including alternative sources of energy, and overseas investment.

Sir Francis reported that invisible exporters had increased their overseas earnings four-fold from £3,719 million in 1968, when the committee was established, to £14,873 million in 1978.

The greatest rise in earnings in the service industries in 1978 was expected by the civil aviation industry. This was attributed to the

recovery of traffic lost through industrial disputes in 1977, the favourable effect of currency movements on fuel costs, and the effect on the volume of traffic of lower fares on some routes. Lower air fares are also expected to be a significant factor in attracting more tourists to Britain.

Target for British Shipbuilders

Financial target for British Shipbuilders was announced by Eric Varley, Secretary of State for Industry, in a parliamentary answer on Tuesday.

He said that in accordance with the Aircraft and Shipbuilding Industries Act 1977, he had made, with the approval of the Treasury, and after consulting British Shipbuilders, the first determination of financial duties for British Shipbuilders. He had notified British Shipbuilders of a duty in its current accounting year, which ends on 31 March 1979, to seek to limit any loss before interest and after receipts of Intervention Fund Assistance, to £45 million, and to conduct its affairs to make progress towards providing an adequate return on the capital employed by the corporation and its subsidiaries.

The short-term target represented the latest forecast of loss by British Shipbuilders. The corporation had not yet been able to finalise its accounts for 1977-78 and was still holding discussions with its auditors and subsidiaries to ensure a more rigorous approach to provision for losses. The forecast of loss was therefore tentative. At 31 March 1978, the corporation had received offers of Intervention Fund assistance of £52 million under which the corporation had received payments of £19.3 million.

BSC maintain break-even objective despite current losses

British Steel Corporation lost £443 million, equivalent to £25 per tonne on each of the 17.4 million tonnes of liquid steel made, in the financial year 1977/78. But the board of the corporation sees no reason to change its objective of operating at a rate of break-even by March 1980, originally set out in BSC's paper *Prospects for Steel* published on 27 April.

Details of the year's workings are set out in BSC's annual report and accounts 1977/78 published on 4 July.

Sir Charles Villiers, chairman of the British Steel Corporation described last year's losses as 'totally unacceptable' and stressed that everything possible must be done to eliminate them.

He explained that after three years of falling deliveries of steel in the UK, the steel cycle, against professional expectation, fell back again and deliveries in the UK finished up lower in 1977 than in any year since 1963. It became clear during the year that, as one of the consequences of the energy crisis, and the changed prospects for a resumption of world economic growth on the same pattern as before, there had been a fundamental shift in the environment for steel. The shift was particularly acute in the UK.

For some years the UK steel market had been shrinking, he continued, while BSC was still set on an expansionary steelmaking strategy. BSC's change of course during the year was set out in March 1978 in the government's white paper *The Road to Viability*, and further described in BSC's publication *Prospects for Steel*.

The following action he emphasised was that capacity must be brought down into line with demand: and investment must be not for more steel, but for better steel. Customers' requirements of delivery and quality must be precisely met, at a competitive cost, and also their technical needs in steel product development. Home market share could be regained from imports, if BSC could do this.

Sir Charles said that BSC must face the fact that Britain did not have to pump such huge resources into steel and there were many alternative claims.

He said that BSC estimated that during the first half of the current year the loss would be about £175 million (before any allowance for contingencies) which was in line with BSC projections made at the beginning of the year, and would compare with £201 million for the first half of last year. The results for the first three months were broadly in line with this estimate. Because of all the uncertainties, he said that he was unable to give any indication of the likely results beyond the first half of the current financial year.

It now seemed likely that parliament would shortly approve the BSC's Borrowing Powers Bill which would raise the limit from £4 billion to £4.75 billion and to £5.5 billion on an affirmative resolution. This finance would enable BSC to keep up a very substantial improvement programme during the next two to three years. Beyond that period further financial support would have to be deserved and earned.

BL Components in business

BL Components began operating on 3 July as an autonomous company within the newly decentralised BL Cars activity.

With headquarters at Cowley, Oxford, BL Components employs 41 000 people in four subsidiaries – Pressed Steel Fisher, Foundries Division, SU-Butec and Parts (which includes Unipart).

Mr P. W. McGrath, managing director, commented on Monday: 'BL Components will have the autonomy to conduct its own business in its own way. It will be responsible for its own business plans, its own future product strategies and its own profitability. In turn, the managing directors of the four subsidiaries will be accountable for their own performance with their own high degree of autonomy so that they can get on with the job of managing their own affairs and increasing productivity.'

Pressed Steel Fisher, the largest of the four groups, employs 26 000 people and specialises in body engineering, body production, tool design and manufacture.

Main products of Foundries Division consist of specialised items such as cylinder block and heads and heavy castings mainly for agricultural tractors and heavy earth-moving machines.

SU-Butec, a major component group employing 8000 people, manufactures automotive components for external customers including Ford, Chrysler, Vauxhall, Volvo and Rolls-Royce, as well as for BL companies.

Unipart employs 3500 people and markets parts and accessories for all makes of motor cars on Britain's roads and exports over £100 million worth of parts.

OVERSEAS

Sixth loan to Yugoslavia guaranteed

ECGD has guaranteed the repayment and funding for a $27.1 million loan which Lazard Bros and Co Ltd acting on its own behalf and on behalf of Commerzbank AG has made available to Hemijska Industrija Zorka of Yugoslavia.

This is the sixth ECGD guaranteeed loan for a major project in Yugoslavia to be concluded this year. The total value of finance provided under these loans is $148 million.

This latest loan will help finance a contract awarded by Jugometal, the Yugoslav state buying agency for the metal industries, to Head, Wrightson Machine Co Ltd of Middlesbrough, Cleveland, part of the Davy International Group. Under the contract Head Wrightson will be responsible for the design, supply of equipment, supervision of erection and commissioning of a tinplate complex at Sabac near Belgrade. The plant is designed to have a capacity to produce 150 000 tonnes of tinplate a year and is due to be commissioned in September 1981.

BOTB applauds NW export drive

Export United, the campaign launched by the TUC, the Confederation of British Industry and the British Overseas Trade Board on the theme 'Exports equal Jobs', was being actively supported in the north west this week.

Sir Frederick Catherwood, chairman of the British Overseas Trade Board, and Lord Limerick, a board member, planned to visit several companies in Manchester, Salford, Stockport, Macclesfield and Wilmslow to applaud their export performance – and encourage greater effort. They were also meeting senior industrialists, trade union officials and representatives of local exporting organisations to discuss prospects for exports from the north west in the future.

Chairmen and Managing Directors

The following executives are seeking to further their careers within fields where proven experience counts and is rewarded accordingly

FINANCE

1. **Financial Executive.** ACA. Fluent German good French. A strong technical accountant with substantial treasury experience in large conglomerate. Seeking career move to widen experience.
Age 29 Salary £6,500+
2. Financial Executive. MBA. ACA good Spanish. A high-flyer with professional merchant banking and industrial holding company experience (Shipping, Hotels, travel, food) world wide. A prize winner who is planning his re-entry into industry.
Age 28 Salary £10,000+
3. **Chief Accountant.** ACA. B.Comm. An energetic New Zealander with successful record in the Australasia Basin with substantial trading group. Seeks a career move to Middle East or Africa to widen experience. Location very flexible.
Age 31 Salary circa £15,000
4. **Financial Executive.** BSc Econ. ACA. Good French. A highly commercially minded executive with international experience in both the profession and industry (textiles, banking, taxation and financial management). Wishes to return to industry with 'sharp end' responsibility.
Age 33 Salary £10,000+
5. **Financial Controller.** ACA, ACMA, ACIS. Good French and German and wide top level international experience in major group. His engineering background has been most useful in major contract negotiations. Seeking career progression with a smaller company.
Age 35 Salary £13,000
6. **Finance Controller/Director.** FCA, ATII. Wide international professional experience includes Iran and Nigeria mainly in construction industry. Contract completed shortly, now seeking new move, location very flexible.
Age 36 Salary (basic) £12,000
7. **Project Manager/International Banker.** AIB. With unique top level experience of the Middle East and East Africa. A highly effective banker, financial manager or business man with entrepreneural talent. Prepared to relocate wherever necessary overseas.
Age 42 Salary £15,000
8. **F/D BA. (Econ).** Fluent French good Spanish. His impressive career in Merchant Banking, financial management and acquisitions covers the Middle East and South America. Wishes to return to overseas appointment.
Age 39 Salary (basic) £12,000
9. **Group F/D.** ACA. Good French. An impressive large manufacturing group top executive with company doctoring experience, especially in management and computer services. Following successful rationalisation promises are not being kept.
Age 39 Salary £14,000+
10. **Group F/D.** MA (Eng) Cantab, FCMA, C.Eng, MICE, MIMC. Good French. An unusual and very able top executive with large group financial and consultancy management background in the engineering and contracting industries.
Age 44 Salary £12,500+
11. **Finance Director.** FCMA. A lively international Professional F/D with large manufacturing group experience covering Europe, America and the Middle East. Having recently set up and sold a M.E. chemical company he now wishes to return to industry – ideally to a UK group.
Age 47 Salary circa £12,000
12. **Business Finder.** MA, PPE (Econ). Fluent French and Spanish. An impressive and successful career diplomat to whose Unctad and Gatt experience, has been added investment management. He now wishes to make more worthwhile use of this ability. Location and remuneration entirely flexible and negotiable.
Age 62

MARKETING

13. **Saleswoman.** ACA. An attractive French/English bilingual French national who wishes to be UK based but prepared to travel world wide. Highly numerate with a good sales personality.
Age 21 Salary £3,000+
14. **Export Manager.** MA (Cantab). Fluent German, Dutch, French and good speaking Cantonese. A tough, able and dedicated exporter with 5 years of textile and general trading experience throughout Far East and Indonesia. Prepared to locate as necessary to use his languages and agency management experience.
Age 25 Salary £7,000+
15. **Export Marketing Manager.** MBA with 7 very successful years in selling automotive products world wide. Frustrated in present slow moving company seeks a more demanding role with more dynamic company.
Age 27 Salary £6,500+
16. **Marketing Manager.** With 9 years successful experience in paper and plastics manufacture and distribution world wide. Promotion blockage.
Age 29 Salary £9,000
17. **Marketing Executive.** BA (Hons), MA. Good French. A highly intelligent manager with 8 successful years in senior level government service. Particularly experienced in East-West trade relating to communications and transport. Seeking a new career in industry.
Age 31 Salary £6,500+
18. **Sales/Marketing Director.** F.Inst, MA. Most successful career in sophisticated equipment and business systems covering markets in Europe, Africa and America. Has controlled a substantial sales force and is excellent general management potential.
Age 33 Salary £14,000
19. **Export Sales Manager.** Fluent French good German, with successful export experience in industrial instruments and manfactured chemical products.
Age 30 Salary £6,000+
20. **Marketing/Planning Manager.** MA (Cantab), MSc (Econ), MBA. Fluent French good Italian. An impressive large group senior executive with merchant bank and industrial management experience in high technology companies, including treasury and venture capital management.
Age 36 Salary £13,000
21. **Marketing/Sales Manager.** Some French and Italian who has had considerable success in very large wholesale and retail enterprises particularly those with 200+ outlets in the food and other f.m.c.g. industries.
Age 44 Salary £12,000+
22. **Export Marketing Manager.** BA Hons. His successful international experience covers tea (T.O. £7 million) toys, as well as 4 years with durable consumer goods and toiletries. Promotion blockage.
Age 34 Salary circa £10.000
23. **Head of Public Relations.** BSc (Econ). Good French some German and Spanish. Experienced journalist mainly in economic and political affairs – especially on behalf of free enterprise. Seeking a fresh opportunity.
Age 53 Salary circa £12,000
24. **Business finder.** BSc (Pure maths). Diploma in Radio Physics. Fluent French, German, Danish. With an excellent scientific and commercial background at governmental levels, especially concerning the EEC. Seeking a new career in industry.
Age 55 Salary circa £7,000

GENERAL MANAGEMENT

25. **Senior Engineer.** BSc Eng Civil. Good French with 5 years practical experience including 2 in Nigeria. Contract nearing completion and wishes to return overseas.
Age 27 Salary (basic) £7,000
26. **Electrical Supervisor.** Some French and Arabic. A mature and active young contract electrical engineer for all services up to 11kV on large construction contracts. Has Saudi and Libyan experience. Seeks career progression for his next move.
Age 30 Salary (basic) £10,000
27. **Group Buyer.** Holds Private Pilots licence and Radio operators licence M.Inst. Good sciences. An enterprising executive with good knowledge of timber and building products. Current rationalisation successfully completed. Now seeking career move leading towards general management.
Age 43 Salary £12,000
28. **Senior Plant Manager.** MPMA. Tough and experienced, with large international company experienced, including all forms of plant, crushers and cranes. Currently responsible for £20 million equipment in Middle East. Seeking career progression, location flexible.
Age 49 Salary (basic) £15,000
29. **General/Finance Manager.** BA (Cantab), ACA. Fluent Danish some French and German. His European conglomerate experience includes airlines, shipping, engineering and insurance. Has worked in Scandinavia, Middle East and Nigeria. A self starter who seeks a fresh opportunity with a European or American base.
Age 34 Salary £15,000
30. **Management Services.** BSc (Econ) Hons. Very successful career in highly technical engineering environment including Contract Leasing experience of sophisticated capital equipment. Seeks a career move leading towards general management.
Age 39 Salary £9,000
31. **Personnel Manager.** MIPM.M.Inst. Work Study. An impressive career in manufacturing with multi-union and multi-site situations. (Work force 4500+). Seeking new opportunity.
Age 45 Salary £9,000
32. **General Manager.** Dip. Eng. (Elect.) Hons. His wide range of experience covers management of manufacturing subsidiaries in Nigeria, Zambia and the UK. With his successful record he seeks a fresh challenge. Location entirely flexible.
Age 39 Salary £10,000+
33. **General Manager.** MA, (PPE). Fluent Chinese, good Malay and French. A well disciplined man with international experience in most aspects of telecommunications including recruitment and training. A virtually unique knowledge of the Far East. Looking for ultimate career move.
Age 56 Salary £10,000+
34. **Marketing/General Manager.** PhD, MSc, MA (Cantab). Working French and some German. Vigorous, intelligent and completely flexible as to location. Wishes to move to a more dynamic company which could include Marketing and Planning.
Age 36 Salary £15,000
35. **General Manager.** Fluent Danish, Swedish, German and French. With substantial manufacturing and marketing experience in Europe. Wishes to return to similar post in UK. Has an excellent growth record.
Age 45 Salary circa £15,000
36. **Chief Executive.** Dip. Ingenieur Elect. Billingual English/German some Portuguese. His impressive international experience covers heavy industrial 'turn-key' projects installation (c. £60 million), engineering services and manufacture world wide, especially in the coal, gas and steel industries. Location very flexible within English speaking countries.
Age 48 Salary £25,000+

NOTES
(i) All the above executives have been interviewed by us and we consider them to be high quality material in their particular range – there are several others whom space precludes.

(ii) If you require an executive of similar capability please contact me.

(iii) If you yourself feel that you match these standards and might benefit from a new opportunity please contact me in the strictest confidence and without any obligation.

Robin R. Ashenden

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Applicants should have a university degree or recognised accountancy qualification. Experience in commercial management with a strong market or financial emphasis is essential. Responsibility should have been carried for assessing commercial opportunities and implementing plans to realise them. Such experience might have been gained as a marketing manager or senior accountant. *(Reference CM/213/TI)*

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Health and Safety Executive Publications

The 1974 Health and Safety at Work Act gave the Health and Safety Commission responsibility for keeping some 25 million people informed of guidelines and regulations for their health and safety in places of work. The Commission has undertaken progressively to revise, standardise and extend the existing regulations and recommended practices. HSC/HSE publications reflect the major programme of research, inspection and consultation which is in hand.

Priced publications are obtainable only from HMSO or through booksellers. Some general leaflets, advice and information are available free of charge from HSE Area Officers or by post from the General Enquiry Point, Baynards House, 1 Chepstow Place, London W2 4TF (Tel. 01-229 3456 ext. 734).

Annual Reports

Health and Safety: Commission Report 1976–77 (£1.25) ISBN 011 883073 2
Health and Safety: Industry and Services 1976 (£2.50) ISBN [illegible] 322 8
Health and Safety: Mines and Quarries 1976 (£2) ISBN 011 883010 4
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Home news

Legislation establishes co-operatives agency

The Co-operative Development Agency Act received royal assent and came into effect on 30 June. The legislation follows a study set up last year by Alan Williams, Minister of State for Industry, when he established a working group on which co-operative organisations, trade unions and government departments were represented. The government accepted the majority recommendations, published in October that the agency should be created as a statutory body to help develop activity in the co-operative sector (*Trade and Industry*, 28 October 1977).

The act provides for the appointment of a chairman and up to eight other members by the secretary of state after consultation with co-operative organisations and any other appropriate persons. The secretary of state may make grants to the agency within a ceiling of £900,000. Subject to parliamentary approval, this may be raised to a maximum of £1.5 million. The working group recommended that the government should bear as launching finance the whole of the estimated cost of £300,000 a year to establish the agency and run it for three years.

The agency's functions are essentially representational, advisory and promotional. It is intended to supplement, but not replace, the existing representative organisations in the co-operative sector. It will not have development funds to invest in co-operative projects. Its general objectives will be to promote the principles and practice of co-operation generally and to represent the interests of the co-operative movement as a whole. It will keep the development of co-operation and the law governing co-operation in the United Kingdom under review, undertake studies and research, and recommend ways in which the development of co-operation might serve the public interest, and be facilitated.

The agency is to identify suitable projects to be undertaken on a co-operative basis, advise on proposals to establish co-operatives, and provide legal, financial and other advice to co-operatives.

Electronic components for Japan discussed

On 21 and 22 June, the UK's Radio Industry Council and the Electronic Industries Association of Japan met for the tenth time. For the first time, the two sides discussed matters of mutual interest other than the UK market situation – namely the possibilities of establishing closer commercial and technical co-operation including the purchase of UK electronic components by Japanese companies, said Alan Williams, Minister of State, Department of Industry, in a reply to a parliamentary question on 29 June.

The government, he said, welcomed these new and positive developments which formed part of the Industrial Strategy being worked out by the electronics consumer goods sector working party.

One of the central objectives of his recent visit to Japan was to remove the misunderstanding dominating the relationship between the British and Japanese consumer electronic industries in 1977 and to replace it with a recognition of the mutual benefit that could flow from greater two-way flows in investment, technology and trade.

Street traders price displays enforced

Robert Maclennan, Parliamentary Under-Secretary of State for Prices and Consumer Protection, checks out Jeannine Boulet's ice cream prices outside Westminster Abbey. Prices of food and drink sold by shops, market stalls, mobile vans and street traders had to be clearly displayed from 1 July onwards. Mr Maclennan said that he was glad to see this coming into operation at the height of the tourist season. Foreign visitors would no longer be at the mercy of dishonest street traders who sold soft drinks and ice creams at grossly inflated but unspecified prices. Those retailers and traders who set a good example by displaying their prices would no longer have to face unfair competition from disreputable elements in the trade. The requirement to display prices arises from the coming into operation of the Price Marking (Food) Order 1978, SI 1978/738, HMSO.

Go-ahead given for £3m Pennine tourism scheme

Approval in principle to a £3 million scheme, including about £1 million from government funds, for developing tourist facilities and attractions in the north Pennines, was announced in the commons by Michael Meacher, Parliamentary Under-Secretary of State for Trade on 22 June.

He said that the development of both serviced and self-catering accommodation, a residential activity centre and other tourist attractions were features of an integrated package of proposals to be financed over the next three to four years by a mix of private and public sector development.

Extensive local consultation within the region, and with the local authorities and government agencies concerned, had been carried out by a working group established for the purpose, Mr Meacher explained. The group's proposals for an integrated package had been devised to provide for beneficial tourism development while avoiding harm to the environment, especially in sensitive areas of great natural beauty or ecological or archaeological significance. The scheme as a whole had been considered and recommended by the English Tourist Board. Two crucial elements in the scheme, as it was implemented, would be its overall balance, for example between accommodation and other types of project, and between private and public sector investment. On the basis that two-thirds of the total investment was forthcoming from non-government sources, the other third, totalling approximately £1 million would be provided by government through the funds made available to the English Tourist Board over the next three to four years.

Mr Meacher said that his approval in principle was therefore subject to his satisfaction, as the work proceeded, that these objectives were still being fulfilled; accordingly he had asked the chairman of the English Tourist Board to arrange for him to receive progress reports at regular intervals. Planning permission for the various projects would be required as necessary in the normal way.

Employment protection not inhibiting industrial recovery

Most British managers find employment legislation does not discourage them from taking on new people. The majority do not find the legislation an obstacle to the shedding of surplus labour and there is little sign that it is inhibiting industrial recovery. These findings of

independent research into the effects of employment legislation in manufacturing industry are reported in an *Employment Gazette* article.

When asked about the effect of recent employment legislation, managers cited the unfair dismissal provisions as having had the most widespread impact, with the result that many have changed their disciplinary procedures and been more selective in their recruitment practices. Most did not see the provisions as having prevented them from recruiting labour. Redundancy procedures, guarantee payments, maternity provisions, right to time off work and other aspects of employment legislation were rarely mentioned by managers.

Whilst managers were evenly divided over whether employment legislation had been to their organisations' advantage, those who felt it had said that it had helped and encouraged them in establishing agreed procedures where none had existed. They no longer suffered the consequences of line managers or supervisors taking arbitrary and idiosyncratic action.

When managers in those establishments where there was a rising demand for their products were asked why they were not taking on new labour, answers focused overwhelmingly on the increase in labour productivity occurring or the existence of spare capacity. Rarely was mention made of any aspect of employment legislation.

The research was commissioned by the Department of Employment and the Manpower Services Commission and was carried out by Policy Studies Institute. Interviews were conducted during June 1977 with 301 establishments in selected areas of manufacturing industry employing between 50 and 5000 employees.

SDA opens hundredth factory in Kilmarnock

The hundredth factory built by the Scottish Development Agency since it was formed two and a half years ago was officially opened on 22 June. The factory, at Bonnyton Industrial Estate, Kilmarnock, has been leased to Prosper Engineering Ltd to expand production of high-tensile studbolts.

The hundredth new building, part of a £35 million programme providing advance and purpose-built factories and extensions, has increased the agency's factory stock by 142 000 m² to 3 million m². This year the agency will spend more than £23 million in building factories and servicing sites for industry.

Lewis Robertson, deputy chairman and chief executive of SDA, said that companies moving into the agency's premises since 1975 had created some 15 000 new jobs, almost 7000 of these in the first 100 new buildings. Altogether almost 73 000 people were employed in the agency's 600 factories, and the building programme alone was supporting about 1500 jobs in the construction industry, he said.

A recent check on the progress of SDA tenants showed a total turnover, including sales, purchases, staffing and administration, of over one thousand million pounds. Emphasis is on manufacturing in these factories, with more than 40 000 technical and production staff among the 73 000 employed.

Ex-quarry in highlands to be transformed for tourism

A £1 million project to obliterate more than a million tons of black slate quarry waste which has overshadowed the west highland village of Ballachulish for decades has been launched by Sir William Gray, chairman of the Scottish Development Agency. The work, which will take about two years, will prepare the area for tourist development. Under study by the Scottish Tourist Board and the Highlands and Islands Development Board will be a major watersports complex and holiday village.

More than 750 000 m³ of slate waste will be re-shaped around the village and along the shores of Loch Leven to create land for tourist and light industrial development. Landscaping work will enhance the surrounding countryside. Three water-filled quarries will be reclaimed, one for industry.

Jobs made for Geordies

Expansion and growth of small local firms has proved to be the most successful part of the City of Newcastle's recently introduced employment policy programme. Already there is a big demand for smaller sites near the city centre; more than 1600 jobs have been saved or created in the last year and of these over 70 per cent have been in existing local firms.

In addition to receiving maximum benefits under the industry act because of its special development area status under the 1976 Tyne and Wear Act, Newcastle can offer qualifying firms assistance with improvement work, loans for sale acquisition, buildings, machinery and equipment, and outright grants towards interest relief, rent, relocation costs and site improvement. It can also declare industrial improvement areas within the city, enabling the improvement of older industrial areas by the provision of new or improved access roads and parking facilities.

Over 70 per cent of jobs in the Newcastle area are now in the service sector – illustrating the city's function as a regional centre – but although there are plans for further office development, the main preoccupation is the provision of future jobs in manufacturing industry, particularly in chemicals and mechanical and electrical engineering.

Knitwear cottage industry revival studied

The possibility of producing and marketing distinctive 'Welsh-style' knitwear made in the home or small factory unit is to be studied by the Development Board for Rural Wales. In effect the board would be establishing a new-style cottage industry. The study will take place in the Ceredigion area.

Such an industry could provide employment and an incentive for families to stay in rural areas without the need for large capital outlay on plant and machinery. It could be a significant move to revive the village population. Use of local Welsh wool in quality controlled, well-styled garments, marketed by modern methods could have dramatic success if carefully planned.

The board has engaged international management consultants, Inbucon/AIC to carry out the study. There will be co-operation from the Department of Industry and the National Economic Development Office.

The knitwear industry is already the subject of a government inquiry and has been selected as one of the key industries in the national Industrial Strategy. There could be vast potential in export markets as well as in purchases by visitors to Britain and in the home trade. The board would be closely concerned with ensuring sophisticated marketing and promotion, after identifying potential investors.

Non-ferrous foundry industry scheme to close

The Department of Industry's non-ferrous foundry industry scheme closes on 31 July. Companies wishing to apply for financial assistance under the scheme should make sure that their applications, with sufficient supporting information, are submitted to their national or Department of Industry regional office not later than 31 July.

The scheme, introduced by Eric Varley, the Secretary of State for Industry, on 24 January 1977 was designed to encourage the non-ferrous foundry industry to invest and so improve its production efficiency through modernisation. Up to £20 million was allocated to the scheme.

With one month of the scheme to run over 150 companies have responded and 103 applications have been approved involving £8.1 million of assistance. A further 60 applications, involving £6 million of assistance are under consideration. In addition discussions have taken place with another 43 companies and these are expected to lead to more applications for assistance involving several million pounds.

Further information is available from Department of Industry, PTM 3C, Room 440, Kingsgate House, 66/74 Victoria Street, London SW1E 6SJ, tel. 01-212 5943.

£1¾m for London boroughs' urban programme

The 1978-79 urban programme for Hackney and Islington – worth £1¾ million – has been approved by Peter Shore, Secretary of State for the Environment. The programme, which includes both capital and revenue grants, has been agreed by the Hackney/Islington inner city partnership. It includes proposals put forward by the Greater London Council,

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Hackney Borough Council, Islington Borough Council and the Inner London Education Authority.

The grants cover industrial, environmental and recreational projects as well as those of a specifically social character, including several schemes devised by voluntary bodies. Central government grant is payable at the rate of 75 per cent of local authority expenditure under this phase of the urban programme. In nearly all cases grant will be paid for five years on the running costs of capital projects and for a similar period on non-capital projects.

The urban aid programme is intended to supplement the main programmes of central and local government by providing facilities to include special problems in the most deprived areas of towns and cities. Other resources allocated to Hackney and Islington include £9 million a year under the urban programme for 1979-82 and £6 million for construction works to be completed by April 1979.

Work begun on factory at Liskeard

Work has started on the construction of an advance factory of about 900 m² for the Department of Industry on the department's site at Station Road, Liskeard.

A contract worth about £203,000 has been awarded to Selleck Nicholls Williams (E.C.C.) Ltd of St Austell, Cornwall. Work commenced on 12 June 1978 and the premises should be completed by January 1979.

Inquiries regarding leasing should be addressed to the Department of Industry, Phoenix House, Notte Street, Plymouth, PL1 2HF, tel. Plymouth 218914.

Leyland Vehicles gets into gear

On 1 July Leyland Vehicles Ltd took over the business and assets of Leyland Truck and Bus, the commercial vehicles sales operation previously handled by Leyland International, and the management of various commercial vehicle operations throughout the world.

One of three main operating subsidiaries of BL Ltd, Leyland Vehicles is responsible for manufacture and sales of trucks, buses and agricultural tractors both in the UK and abroad, an operation involving 40 000 people. Annual sales in 1978 are expected to be worth more than £700 million.

Leyland Vehicles is the only company in the reorganised group to trade under the name Leyland and to use the name Leyland on its products. Its responsibilities include the nine truck and tractor manufacturing plants and five bus producing plants (jointly owned with the National Bus Co) in the UK; the major truck assembly plant in Belgium and bus making concern in Denmark, service outlets and sales operations in France, Belgium, Holland, Denmark, Italy and Scandinavia; and truck producing plants (wholly or partly owned by BL) in India, Iran, Nigeria, and Turkey. Overseas sales are processed by Leyland Vehicles subsidiary, Leyland Vehicles Exports Ltd.

The company's products range from 3.5 tonne gross vans through a complete series of light, medium and heavy weight trucks, a whole variety of single- and double-deck bus chassis, and a range of agricultural tractors.

£5.5m BSC tubes development scheme completed

A £5.5 million scheme now completed at Bromford Tube Works, Birmingham, part of the British Steel Corporation's tubes division, is producing a high-quality product which is proving successful in the power generation industries both at home and abroad. The money has been spent on extensions to the reheating furnace, a new feeder carriage for 'C' mill rotary forge and improved finishing facilities.

The final stage in the modernisation scheme was the installation of a new tube de-surfacing plant which machines the full length of the tube surface, increasing non-destructive testing rates and giving an improved surface finish to the final product.

De-surfaced tube supplied by Bromford has been used successfully for underwater operations in the North Sea and similar tube is being supplied for the Drax 'B' power station and other power generation projects in Canada, South Africa, Australia and India. Large quantities of tubing are sold abroad, last year at least 40 per cent of output was exported.

The quality control programme meets the requirements of a range of internationally recognised standards and, in addition to the approval granted by the Ministry of Defence, approval to supply tubes for power generation applications has been granted by the Central Electricity Generating Board.

Spirit of co-operation marks shipbuilders first year

By far the most encouraging development over the past year for British Shipbuilders had been the continuous breaking down, by all parties, of old-fashioned and deep rooted attitudes, and their substitution by informed, active and hard-headed involvement, and participation, said its chairman, Admiral Sir Anthony Griffin on 26 June. Outlining to the annual conference of the Confederation of Shipbuilding and Engineering Unions some of the activities of the corporation during its first year, he paid tribute to the new spirit of co-operation which had developed throughout the industry.

'Our association with the confederation collectively, or with individual members, and whether or not they are also part-time members of British Shipbuilders' Board, has developed into a unique relationship of incalculable value,' said Sir Anthony.

The results had been dramatic, and in ways which were unthinkable before nationalisation. For instance, thousands of tons of steelwork were now being swung around the industry to help even out peaks and troughs in indi-

vidual yards. There was the remarkable example of the Swan Hunter design team pledging their support regardless of where the Polish ships, formerly earmarked for Swan Hunter, were built.

The joint monitoring arrangements had been enormously helpful in the corporation's marketing drive which was currently following up some 150 inquiries for merchant ships from over 30 countries. This was quite apart from warships, fishing vessels and offshore development which it was also pursuing. 'We clearly cannot expect to bag the lot, but it is crucial that we succeed with a sizeable number, if we are to avoid the savage effects of severe over-capacity in the autumn.'

Price is the dominating factor, said Sir Anthony, and the corporation's competitors were desperately tendering below cost. The major weapon in this war for survival was the intervention fund, and through its careful application it won more orders last year than any of its European competitors. The government and the corporation had for many months been negotiating with the EEC for a further fund, and the fundamental argument rests on the issue of maritime interest which it was believed applied not only to Britain but also to western Europe as a whole.

Sir Anthony added, 'In national terms, we consider a country's maritime interest is measured by its dependence on the sea for its survival, and here the Japanese and ourselves are unique. As a highly-populated and industrially-developed island, we must control our maritime trade, or it will fall into the hands of our economic competitors. This means pre-eminently that we must have a strong British merchant fleet. In turn, this means that British owners must have the backing of a commercially-attractive British shipbuilding, repair, and engine-building industry if they are not to become wholly dependent on the yards of their shipping competitors.

Onshore oil output quadrupled

British oil business is booming in this quiet backwater of Dorset with news that production at Wytch Farm – the UK's biggest onshore oil discovery – will be four times larger than first predicted. Orginally it was thought that the field would yield no more than 4000 to 5000 barrels per day. The more recent discovery of a second reservoir, believed to be of similar elliptical shape to the original structure which lies above, means that by the end of next year oil will be produced at a rate of 16 000 barrels a day. This is not far short of the output from the North Sea Argyll Field. The peak annual rate of nearly 6 million barrels is likely to be maintained for several years, with actual production lasting 15 to 20 years. The output will be divided between the two licence holders, British Gas, the field's operator and British Petroleum.

Instant coffee and other prepacks to go metric

The first of two further draft metrication orders published on 28 June, by the government, allows for prepacked 'instant' coffee and similar products to be sold additionally in a range of prescribed metric quantities from 1 July 1979. At the moment these products may only be sold in a range of prescribed imperial quantities. The metric range proposed for coffee is: 50 g, 100 g, 200 g, 300 g, 500 g, 750 g, 1 kg, 1.5 kg, 2 kg, 2.5 kg, 3 kg and multiples of 1 kg.

The second order dealing with certain prepacked products (pasta, flour and flour products, dried fruit and vegetables) for which both imperial and metric ranges have already been prescribed, requires manufacturers and importers to cease to pack or import the imperial range of quantities from specified dates – for pasta, flour and flour products from 31 August this year, and dried fruits and vegetables from 31 December.

The coffee and chicory extracts order implements the weights and measures provisions of the EEC directive 77/436/EEC. The compositional and labelling aspects of this directive will be implemented by the Ministry of Agriculture, Fisheries and Food. Neither order imposes any new legal requirements or obligations on retailers and the proposals have the support of industry and consumer organisations.

Fraser to speak at consumer safety conference in London

A one-day conference on the consumer safety bill has been arranged by European Study Conferences in order to study the implications of this new act which is expected to be in force in July this year. It is bound to have an effect on methods of design, production, inspection and marketing of goods in the UK.

John Fraser, Minister of State, Department of Prices and Consumer Protection, and Neville Trotter, promoter of the bill through parliament, will speak at the conference which is to be held at the Cavendish Centre, London, on 20 July.

Further information is available from Mrs Thorogate at European Study Conferences Ltd, Kirby House, 31 High Street East, Uppingham, Rutland, Leicestershire LE15 9PY, tel. Uppingham 2711.

Gas and electricity bills code to be reviewed

A review of the code of practice on the payment of gas and electricity bills is to start towards the end of July. The aim will be to adopt any agreed changes in time for the coming winter.

The review, announced by Dr John Cunningham, Parliamentary Under-Secretary of State for Energy, on 22 June, will be conducted by the Department of Energy, the gas and electricity industries and their consumer councils, under Dr Cunningham's chairman-

ship. Introduced by the industries in December, 1976, the code provides consumers with guidance on the steps to take if they expect to have difficulty in paying their bills.

Dr Cunningham said that the purpose of the review would be to examine both the provisions of the code and the way in which it had been operated by the industries, to see if any worthwhile improvements were necessary.

He invited organisations and individuals with practical suggestions for improving the code to send their views as soon as possible, and in any event by the end of August, to the Electricity Consumers' Council, the National Gas Consumers' Council or to any of the area electricity consultative councils or regional gas consumers' councils.

Royal Doulton prices to be investigated

Price increases proposed by Royal Doulton Tableware Ltd are to be investigated by the Price Commission. The company wants to increase by an overall weighted average of 9.3 per cent the prices of its range of china and earthenware tableware and ornamental items. The investigation is due to be completed by 6 October.

More time for insulated electric wire and cables reference

Following representations from the Monopolies and Mergers Commission that their report on the supply in and export from the United Kingdom of insulated electric wire and cables cannot be completed by 30 June 1978, the date specified in an earlier direction, Roy Hattersley, Secretary of State for Prices and Consumer Protection, has given a direction that allows the commission an extended period to 30 September 1978 for the purpose of reporting on this reference.

Price Commission opens office in Southampton

As part of a restructuring of its regional organisation the Price Commission opened an office in Southampton on 4 July. Ron Walch, who previously worked in the commission's London headquarters, has been appointed regional manager and will be in charge of the office.

The new southern regional office in Clifford House, New Road, Southampton, tel. 37422, will serve the public and commerce in Dorset, the Salisbury district of Wiltshire, the Newbury district of Berkshire, Hampshire, West Sussex (except the Crawley and mid-Sussex districts) and the Isle of Wight.

In addition to dealing with inquiries and complaints on prices from people in the region, Ron Walch and his staff will assist headquarters in other Price Commission work, including the monitoring of prices and the conduct of examinations and investigations into sectors of industry and into individual enterprises.

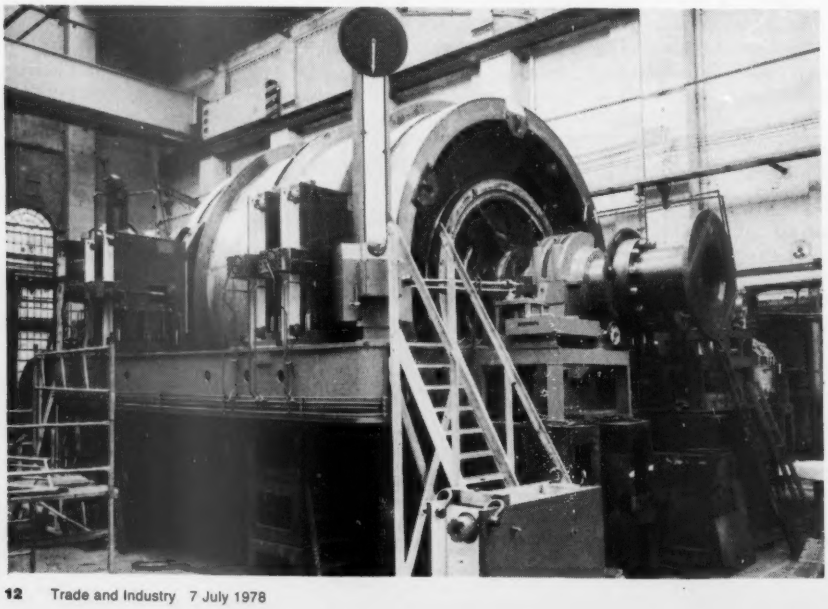
Marine survey office moves

The Department of Trade's marine survey office, presently located at 37-41 Prince Street, Bristol will move to a different address on 26 July. The new address will be Department of Trade, Marine Survey Office, Stuart House, 16 Union Street, Bristol BS1 2DG.

The telephone number will be unchanged at Bristol 20161.

Robey supply winder to NCB

This mine winder manufactured by Robey of Lincoln Ltd, for the National Coal Board's Bentley Colliery is to be used for winding from a depth of half mile at a speed of 30 mph. It will raise 48 men or 5 tons of material at about 150 tons per hour. It can be operated manually or automatically.



Industrial news pictures

Pictures are published in *Trade and Industry* each week showing developments in British industry. If your company has introduced an interesting new product, if you have received an award, if you have developed a novel manufacturing process, if you have produced the biggest or smallest or heaviest or (you feel) the best designed product, you are welcome to send us a photograph with a short news story.

Contributions should be sent promptly – while the subject is still newsworthy – to the Editor, *Trade and Industry*, Room 439, 1 Victoria Street, London SW1H 0ET.

Plans required from waste disposal authorities

Section 2 of the Control of Pollution Act 1974 was brought into force on 1 July 1978 in England and Wales. This represents a further step towards full implementation of part I of the 1974 act, which deals with waste on land.

This section requires each waste disposal authority (in England, county councils and the Greater London Council and in Wales, district councils) to carry out a survey and prepare a plan for the disposal of household, commercial and industrial waste situated or likely to be situated in its area, and from time to time to review the plan and modify it where appropriate.

Many authorities have already commenced work on their surveys. Money is available to the authorities, through the rate support grant to enable them to complete their survey and plan work. It is expected that authorities will have made substantial progress within 18 months to two years of the coming into operation of section 2 ensuring that strategic planning for waste disposal is operated on a nationwide basis.

Part I of the 1974 act institutes a new system for the comprehensive planning and regulation of waste disposal operations, so as to ensure that disposal is carried out to satisfactory standards and that the best use is made of waste materials.

No change in development land tax proposed

On 27 June Denzil Davies, Minister of State, Treasury, announced that the government proposed that the reduced rate of development land tax of 66⅔ per cent should operate for a further year. Accordingly it will apply, where

appropriate, to disposals taking place on or before 31 March 1980. The necessary legislation will be included in next year's finance bill.

Under the Development Land Tax Act 1976 the first £10,000 of development value realised in a financial year (ending 31 March) is exempt from the tax. The next £150,000 in any year up to and including that ending on 31 March 1980 will be charged at a lower rate of 66⅔ per cent. The rate for any amount over £160,000 is 80 per cent.

New chairman for Crown Agents

Sidney Eburne, managing director of the Crown Agents for Overseas Governments and Administrations is to become chairman of the Crown Agents at the beginning of October.

Registered Designs Act 1949

The Registered Designs (Amendment) Rules 1978 which were published on 5 July 1978, increase certain fees on or after 2 October 1978.

The fee for the extension of the period of copyright in a design paid in advance in respect of any period beginning on or after 2 October is increased with effect from 3 July.

Copies of the new rules (SI 1978 no. 907) may be obtained from the Patent Office, Orpington, Kent, BR5 3RD; from the Sale Counter, Patent Office, 25 Southampton Buildings, London WC2A 1AY, and from any HMSO bookshop, price 25p net.

Patents recorded 'licences of right'

Under section 46 of the Patents Act 1977 the register was noted 'licences of right' in respect of the following patents on the date specified.

20 June 1978

1157265 Chrysler United Kingdom Ltd
Improvements in or relating to vehicle cooling systems

1170342 Chrysler United Kingdom Ltd
Improvements in or relating to vehicle heaters

1208619 Chrysler United Kingdom Ltd
Improvements in or relating to pistons for reciprocatory internal combustion engines

1288392 Chrysler United Kingdom Ltd
Improvements in or relating to plugs for sealing holes

1289992 Chrysler United Kingdom Ltd
Improvements in or relating to vehicles

1320320 Chrysler United Kingdom Ltd
Improvements in or relating to press tool and holder assemblies

1347678 Chrysler United Kingdom Ltd
Improvements in or relating to anchorages for seat belts

1446337 Chrysler United Kingdom Ltd
Improvements in or relating to gear selection mechanisms

1140654 Daimler-Benz Aktiengesellschaft
Improvements relating to vehicle seats

1384148 Ibis Engineers Ltd
Improvements in trouser presses

1395634 Bayerische Motoren Werke Aktiengesellschaft
Fuel supply system for mixture-compressing internal combustion engines

1436759 Brian Lionel Bateson
A tipping vehicle for crops or other loads

1491035 BBC Brown Boveri and Co Ltd
Control apparatus for at least two motors the shafts of which are coupled mechanically

Any person who claims that the proprietor of the patent is, and was at the time of entry, precluded by a contract in which the claimant is interested from granting licences under the patent may, within three months after the making of the relevant entry, apply to the comptroller on patents form 31/77 for cancellation of the entry.

I. J. G. Davis, Comptroller

Merger proposals cleared

Secretary of State for Prices and Consumer Protection, Roy Hattersley, has decided, on the information at present before him, not to refer the following proposed mergers to the Monopolies and Mergers Commission under the provisions of the Fair Trading Act 1973:

Hawker Siddeley Group Ltd's acquisition of a 52 per cent interest in Carlton Industries Ltd.

Thomas Tilling Ltd and the Yale Lock and Hardware Division of Eaton Ltd.

Kearley and Tonge Ltd and Alliance Wholesale Grocers Ltd.

Post Office Staff Superannuation through Barclays Bank Ltd and Investment Trust Corporation.

Government sales

Sales by auction

18 and 19 July 1978 – Miscellaneous

Location
Embassy Suite, Balkerne Lane, Colchester, Essex

Auctioneers
Fenn Wright Garrod Turner (Dept L), 146 High Street, Colchester (0206 46141)

Stores lying in Kent, Essex, Suffolk and Cambridgeshire including 48 Mini saloons, 13 Bedford ambulances, coaches, trucks and tractors. Clothing and textiles, machine tools, furniture, scrap metals, MT spares, tyres, binoculars, bicycles and other miscellaneous items.

25 and 26 July 1978 – Miscellaneous

Location
Garrison Theatre, Graven Hill, Bicester, Oxon

Auctioneers
Midland Marts Ltd (Dept L), 4 Market Square, Bicester (08692 2073)

Stores lying at COD Bicester and other depots including clothing and textiles, furniture, tentage, tyres, MT spares, hand tools, jacks, generating sets, wristwatches, Ford saloon cars, Fordson tractor, fork lift trucks and other miscellaneous items.

Catalogues, which give details of the lots, conditions of sale, viewing times etc, are available from the auctioneers from two weeks before and up to the day of the sale, price 40p, postage 15p.

PUBLIC AUCTION SALE

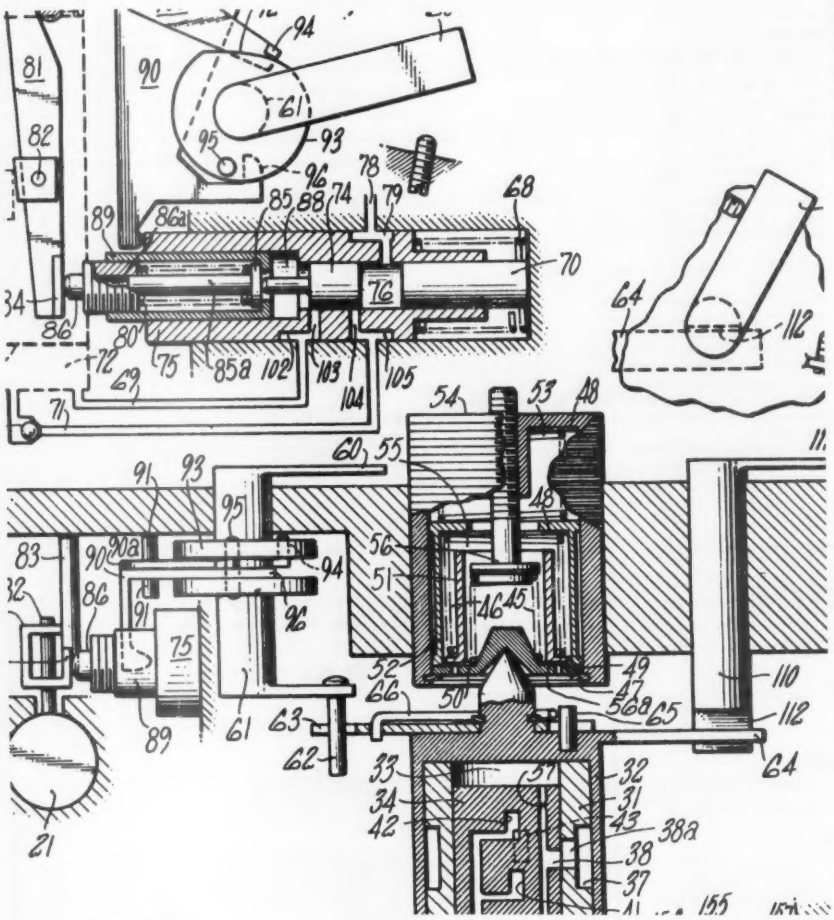
BRISTOL

A public auction sale of surplus government furniture and equipment has been arranged at the DOE PSA Supplies Store, Bay 5, Ashton Vale Road, Bristol, Avon BS3 2HJ. The sale will commence at 10.00 hours on 12 July 1978 and viewing will be allowed from 10.00 to 16.00 hours on the day previous.

The auctioneers are Messrs Stanley Alder and Price, 7 St Stephens Street, Bristol, Avon BS1 1EG. Telephone 0272 299151 and catalogues will be available directly from them, price 15p.

Patenting of inventions drastically revised

As from 1 June 1978, the law of patents in the United Kingdom has been subjected to a drastic revision. The basis upon which patents – letters patents for an invention – have been granted for at least the last four hundred years has been completely changed with the coming into force of the Patents Act 1977 and the substantial repeal of all previous patent legislation. Ronald Bowen, assistant comptroller of the Patent Office, describes the changes that have taken place and how the new act works.



A new legal system for the granting and control of patents – the Patents Act 1977 – came into force on 1 June 1978. As from that date applications for patents must be filed at the Patent Office under this new act of parliament and the subsequent proceedings on the application are controlled by it. Furthermore, from that same date applicants will have other avenues open to them; the European Patent Convention (EPC) and the Patent Co-operation Treaty (PCT) also became effective on 1 June and these both provide machinery by which a single application can result in granted patents in a number of countries, including the United Kingdom.

Patents granted under the new legislation still afford monopolistic rights to the person to whom they are granted but the mechanism of grant no longer relies upon an exercise of the royal prerogative; for the future a patent will no longer be in the form of a grant made by the sovereign. Nevertheless, from a practical viewpoint, patents will continue to be granted to applicants after they have made application to the Patent Office and officials in the office have satisfied themselves that patents may properly be granted on the applications made.

Perhaps the most significant change introduced by the new legislation is that the applicant now has to satisfy the Patent Office not only that his invention is novel in the sense of being new but also that it contains an 'inventive step'. Formerly to obtain a patent it was only necessary for the applicant to point to a distinction between his invention as defined in his claims and what had previously been described, though this did not mean that it was safe from attack by third parties. Now he must also satisfy the office before he is granted a patent that any such distinction is inventive.

Applicants who already have applications filed before 1 June will continue to have their applications processed under the previous act, the Patents Act 1949. The sole exception to this rule arises in the case of a person who filed a provisional specification before 1 June but did not follow it up with a complete specification before that date. The application in that case lapsed on 31 May, but the applicant is, subject to certain restrictions, able to file a new application under the 1977 act, taking advantage of the 'priority' established by his application filed under the 1949 act. A new application must be filed within 15 months of the original application date.

If however, a complete specification has been filed before 1 June, the application will continue under the old act. Up to the grant of a patent, the same procedure as that applicable before 1 June will continue to apply except that once his complete specification has been published all other documents filed after 31 May, such as letters and proposals for amendment, as well as official letters dated after that date, will also be published, and the opportunity for an interested third party to oppose the grant will no longer exist. Oppositions already in existence and upon which issue has been joined before 1 June will continue under the old act.

The grant of letters patent will take place under the 1949 act and will be in the same form as applied before 1 June. In a number of respects the old act will continue to apply to this patent but in a number of other respects it will not and the new act will apply instead.

Term of patent

The term of a patent granted under the new act is 20 years from the date of filing the application. Under the old act the corresponding term was 16 years and this term will continue to apply to all patents which are due to expire on or before 1 June 1983. However, old-act patents due to expire after that date will have four more years available to them subject of course to the further renewel fees being paid. As a quid-pro-quo for the longer term provided under the new act, extension of term as was possible under the old act will no longer be available, except that old act patents for which the maximum term expires on or before 1 June 1983 may have their terms extended for up to four years on application being made under the appropriate section of the old-act. Extension will not be automatic and the applicant for extension will have to show good reason just as he was obliged to do in applications for extension filed before 1 June.

Restoration

The old act provided that if a patentee had inadvertently allowed his patent to lapse through failure to pay a renewal fee he should have up to three years in which to seek its restoration. He had to make his application to restore as soon as he becomes aware of what had happened. The new act allows only one year for restoration and this applied from 1 June to all patents whether they were granted under the 1949 or the 1977 act. In order to make sure that a patentee is made aware when a patent has lapsed through failure to pay a renewal fee, he will receive a warning, in addition to the usual reminder, approximately seven months after the date of lapsing.

Revocation

Under the old act limited powers to revoke a patent during the one-year period following its

grant were vested in the comptroller. More comprehensive powers of revocation were available to the high court. As from 1 June, the grounds upon which a third party may apply for revocation of an old-act patent to the high court or to the comptroller will be the same. With one minor exception these are the same as those formerly available only to the court and they continue to apply to all old-act patents, whether granted before or on or after 1 June.

Registration of transactions

It is important that any transaction, instrument or event giving a person an interest or rights in a patent should in the future be registered at the Patent Office in the register of patents. This is because the new act provides that if two persons claim to have acquired the same interest or right, the one that registers it first can assert it against the other even if the other acquired it first, subject always of course to his acting in good faith and in ignorance of the other person's prior acquisition. This applies equally to patents granted under both acts and differs from the provisions of the old act which, although requiring a person to register an interest, had no effective sanctions to ensure that this had been done.

It is also important to bear in mind that if infringement of a patent occurs after the date on which, by virtue of some transaction, instrument or event, a person becomes the new proprietor of the patent or an exclusive licensee, no damages will be awarded for infringement prior to registration unless registration occurs within six months of the date of the transaction, instrument or event or the court or comptroller is satisfied that such registration within the time allowed was not practicable.

Licences of right

Endorsements 'licences of right' made under the old act will continue to be effective, but as from 1 June endorsement of the patent was no longer possible. Nevertheless upon application being made under the Patents Act 1977, a notice will be entered in the register of patents to the effect that licences under the patent, whether granted under the old or new acts, are to be made available as of right. Patents recorded 'licences of right' are published weekly in *Trade and Industry*.

Compulsory licences

Compulsory licences granted under the old act will continue in force after 1 June and facilities exist under the new act for the comptroller to order the grant of a compulsory licence for reasons similar to those existing under the old act. There is, however one notable exception; section 41 of the Patents Act 1949 which related to the grant of licences for substances capable of being used as food or medicine or in their production, processes for producing such substances, or inventions capable of being used as or as part of surgical or curative devices, has been repealed and replaced by no corresponding provision in the new legislation. Consequently special provisions no longer apply to the grant of compulsory licences relating to food, medicine and surgical or curative devices, though the continuing provisions preserved in the new act may be invoked where appropriate.

Infringement

The proprietor of a patent granted under the Patents Act 1949 will be able to bring an action for infringement before the patents court established by the new act or, with the agreement of the alleged infringer, before the comptroller. If the action refers to alleged infringing acts committed before 1 June, or acts continuing after that date but started before that date, it will be judged on the basis of the law existing before that date. However, if the action refers to alleged infringing acts done on or after 1 June the action will be tried on the basis of the provisions of the new act.

This means, among other things, that the proprietor of the patent will be able to plead 'contributory infringement', ie not merely that what the defendant has done in the United Kingdom amounts to infringement of the rights protected by the patent, but that he has provided the means enabling some other person to infringe or that he has imported or otherwise made available a product obtained directly from the invention whose infringement is alleged.

Filing under the 1977 act

Anyone accustomed to filing patent applications under the 1949 act, will find some far-ranging changes in the procedure relevant to applications filed under the 1977 act. He will be required within one year of filing his application or within one year of his 'declared priority date' to file a 'request for search'. He will then receive, within a few months of filing the 'request for search', a report from a search examiner listing the relevant prior art. The application will be published shortly after this and printed copies of the application placed on sale.

In this connection, it should be noted that the application will be published in the form in which it is filed and it is important therefore that it be carefully prepared. Then, and only then and subject to his filing a 'request for substantive examination', will the actual examination of the merits of the application take place. Finally, provided he is able to satisfy the examiner dealing with his application that it complies fully with all the requirements of the 1977 act and the Patents Rules 1978, he will be granted a patent. No formality will attend the granting of a patent and no fee will be required, but a certificate of grant will be sent to the applicant.

After grant renewal, fees will have to be paid if it is desired to keep the patent in force for the full term of the patent of 20 years. There is now, however, no provision available for prolonging the life of a patent.

One marked change in procedure that needs to be noted is that as from the date of publication of an application, letters and proposals for amendments as well as office letters to the applicant or his patent agent will become available for inspection by the public.

International patents

The procedure already outlined for obtaining a patent in the United Kingdom does not now however represent the sole route available for a potential applicant wishing to obtain a patent protecting his invention in the United Kingdom. As from the date on which the new patents act came into force, two international systems of granting patents, known as the European Patent Convention (EPC) and the Patent Co-operation Treaty (PCT), also became effective.

The EPC covers a number of European countries and the European Patent Office (EPO) processes an application right from the time of filing up to the time of grant. The PCT, which is of potentially world wide operation, embraces many more countries but it is essentially a work sharing arrangement which uses existing national facilities and does not provide for central processing and examination of applications to grant.

A European application by a British resident must normally be filed at the UK Patent Office but subsequent processing of the application is for the European Patent Office. The application will be searched at the Hague branch and examined at the headquarters of the office in Munich before a patent is granted. This patent then becomes the equivalent of a number of national patents in the member states which the applicant has 'designated' as those in which he wishes to obtain protection.

Applying for a patent

Details of the procedure which an applicant would have to follow are set out in an official pamphlet 'Applying for a Patent', which has been completely updated in anticipation of the introduction of the new legislation. Copies may be obtained, free of charge, on application to the Patent Office, 25 Southampton Buildings, London WC2A 1AY.

Each such patent is thereafter administered by its corresponding patent office. Thus a European patent application designating the United Kingdom will eventually result in a grant made directly by the UK Patent Office under the Patents Act 1977. Thereafter to keep the patent in force, so far as it represents a UK grant, the standard UK renewal fees will have to be paid.

An application made under the PCT must be made, on the approved PCT form, to whichever 'receiving office' is appropriate. For residents of the United Kingdom this will be the UK Patent Office. The application may designate any one or more of the contracting states. Copies are sent from the receiving office to the international bureau of the World Intellectual Property Organisation (Wipo) at Geneva and to an 'international searching authority' which, for applications filed at the UK office, will be the European Patent Office's search division at The Hague. The application will be searched at The Hague and then published by Wipo.

Except that optional facilities will exist for a limited 'international preliminary examination', the international processing of the application will then cease and copies will be made and sent to the patent offices of all the countries designated in the application. These offices will complete the examination of the application in accordance with their own procedures and, provided the application is eventually found to be in order, grant a domestic patent just as would be done for an application dealt with wholly in each office.

There are as yet no facilities available for obtaining the grant of a truly international patent. However the Community Patent Convention, which is expected to become operative in about 1980-81, provides the possibility for a community patent, which will be granted by and administered from the European Patent Office. Such a patent will be effective over the whole of the EEC.

New publications

Communications technology examined

In April this year, the electronics division of the Institution of Electrical Engineers organised a conference which was held in Birmingham. Entitled 'Communications '78', it was the fourth in a series of conferences designed to examine the latest trends and developments in communications technology throughout the world. The full proceedings have now been published.

Speakers dealt with many aspects of the subject, describing in some depth a variety of systems, from 'ADX message switching systems for West German police' and 'Advances in Intelsat station technology' to 'Underwater sonar communications'. The emphasis throughout was placed on the user's needs. From the conference papers, three major themes emerge. They concern defence and military equipment, PTT telecommunications and fixed and mobile radio communications.

Although some papers obviously require a certain level of technical knowledge, they are, by and large, written with an eye to a broader audience in the management field. Business people with an interest, even if they are not technically orientated, should find much to interest them.

Communications Equipment and Systems. Proceedings of a Conference. Conference Publication no. 162. Institution of Electrical Engineers, Station House, Nightingale Road, Hitchin, Hertfordshire SG5 1RJ. 1978. xxiii, 423 pages; paperback, £18.00 (UK). £21.50 (overseas). (ISBN 0 85296 186 3).

Getting paperwork into perspective

During the last century, the use of paper in the commercial world has tended to run amuck. In recent years the problem has been exacerbated by the introduction of the computer for document processing. The need for some rationalisation has become chronic, both at national and international level. In this context, the appearance of a new ringbound publication from the Simplification of International Trade Procedure Board (Sitpro) must be viewed with interest.

If the difficulties caused by the growth of documentation are to be avoided it is vital that national and international standards are agreed as soon as possible for the transmission of data by automatic processing techniques. Sitpro's data standards manual, which was prepared after detailed consultation with over 80 companies and organisations throughout the country and with assistance from a further 100, reflects this need. There is hope that, through Sitpro's contacts with overseas organisations which are also active in this field (mainly the United Nations Economic Commission for Europe), this new manual will make an important contribution to the development of internationally agreed standards.

Those using or considering the use of computers in the export/import area of their work should find the manual's data elements glossary particularly useful. It itemises standard formats for each data element and lists or recommends relevant coding systems. Also covered in the glossary are the major requirements for exporters, importers, carriers and forwarding agents, both for 'in-house' use and for local and international data interchange. A variety of other standards are covered, including those for telecommunications links. The loose-leaf format will enable further amendments to be added as and when agreement is reached on standards.

Sitpro has also brought out a publication on what the future holds for computers in international trade and transport. Looking to the mid 1980s, it weighs up how performance and costs of systems will affect the user, and considers possible major developments to the end of the century. The main conclusion seems to be that costs are likely to fall.

Computers in International Trade and Transport data standards. Sitpro. 1978. Available from J. M. Dent and Sons (Distribution) Ltd. Dunhams Lane, Letchworth, Hertfordshire SG6 1LF, or from National Computing Centre Ltd, Oxford Road, Manchester M1 7ED, or from any NCC regional office. Two volumes. Ringbound. £30.00. (ISBN 0 9505171 2 7).

Future Trends in Computer and Communications Systems. Sitpro. Available as above. iii, 46 pages. £5.00. (ISBN 0 9505171 1 9).

Computers and the law

Extensive progress and expansion in computers have had far-reaching effects in the business and commercial world – not least in the legislative field. Certain areas of law, such as copyright, tort, contract, patents, copyright and privacy, have been particularly affected by the computer and its application.

Colin Tapper, author of 'Computer Law', considers the central doctrine of this legislation and examines its relationship with the computer. He makes extensive use of case histories, both from this country and the United States, to show a variety of approaches to the common law.

Although it is written in terms that the non-lawyer will understand, the book does expect a certain familiarity with the computer and its terminology. It must be remembered that much of the legislation in force today originates from a time when computers were not in general use, nor, in many cases, even contemplated. Their introduction has brought many new problems relating to their acquisition, operation of the system and liability for abuse when the system is in operation. This is an area that increasingly concerns management and Mr Tapper's book goes some way to clarify it.

Computer Law, by Colin Tapper. Longman, 1978. xxv, 190 pages. £6.95. (ISBN 0582 45063 2).

Saint who?

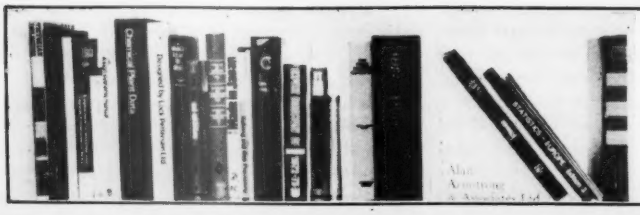
'St Merino is of course the patron saint of all those having the wool pulled over their eyes', says the publicity for Norman Sanders' guide for beginners to the management problems of computers. An occasionally jokey approach, with a scattering of amusing drawings, gives the book a rather transatlantic feel. Yet there is no denying the practicality of the author's approach, or the vast experience he brings to his subject: one certainly gets the point and remembers it.

As Mr Sanders observes, the purpose of the book is not to explain how computers work as an end in themselves, but to 'put you in the driving seat of computing in your own organisation'. Despite our reservations as to its style, this could be worthwhile for many starting in the subject from scratch.

The St Merino Solution: a manager's guide to computing, by Norman Sanders. Associated Business Programmes Ltd, Ludgate House, 107-111 Fleet Street, London EC4A 2AB. 1978. x, 271 pages. £6.95.(ISBN 0 85227 079 8).

Energy publications in print

A new editon of a useful list covering all the Department of Energy's publications currently in print is now available free from the Department of Energy Library, Thames House South, Millbank, London SW1P 4QJ.



The books reviewed above – and many other business books are available immediately from:

THE BUSINESS SCHOOL BOOKSHOP

Sussex Place, Regent's Park, London NW1 4SA 01-723 3902

★ **THIS MONTH'S RECOMMENDED PURCHASE:**
'The Directory of Export Buyers in the UK'
First edition 1978 – £25

New products

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Microelectronics provides complex traffic counting

What is claimed to be the only automatic vehicle classifier has been developed by Golden River Co Ltd, Bicester. Based on a microprocessor, the modular system provides rapid count and analysis of complex traffic data from up to 16 sensors in four lanes of high-speed traffic. Up to six vehicles a second travelling at over 150 km/h can be monitored.

The system copes easily with tasks varying from determining traffic densities to vehicle classification, spacing and speed measurements. It provides considerable time and cost savings over traditional electro-mechanical systems, the makers claim. The equipment can record all data on a particular vehicle passing a selected site; alternatively, a summary of this information can be recorded. Only minor software alterations are needed to interface the system with telephone lines for remote retrieval of roadside data.

Vehicle classification and count are performed by measuring vehicle length, number of axles and wheelbase dimensions. A software program controls and instructs the operation at speeds of up to 150 000 operations per second.

Sixteen interchangeable modules enable systems to be tailored to specific requirements, and standard interfaces ensure compatibility with various ancillary equipment including modems, teletype machines, visual display units and printers. Data are obtained either from induction loop-detectors placed under a road surface or tube detectors laid across the road.

A cassette input/output module enables up to 100 000 characters to be stored; a program module can be used to display address and data, and a programmer module for entry and editing of programs and data. Information that can be recorded includes vehicle number, which is zeroed automatically after a count of 10 000; time of arrival, which is accurate to 0.01 second; vehicle lane number; distance from preceding vehicle in each lane up to a maximum of 999 m; accurate vehicle speed; classification (in accordance with European community definitions); vehicle length; and wheelbase.

Further information: circle 712

One-man submersible for depths to 600 m

A one-man atmospheric submersible with an operating depth of 610 m – and fitted with twin manipulators powered by sea water – can also be used as a remotely controlled vehicle. Mantis is 2.5 m long and has a payload of 200 kg. The operator, working in 'shirt sleeve' conditions and normal atmospheric pressure, controls the manipulators from a central console whilst laying on an ergonomoically designed couch.

Two independent built-in life support systems give a total of 40 hours nominal capacity. Each is fully automatic but can operate as a manual system in the event of a complete electrical failure. Emergency batteries automatically give 40 minutes of full thrust power if the surface power supply fails. Mantis is supplied as a complete operational package with a back-up system.

Further information: circle 713

Wash prevents mould and bacteria contamination

A low toxicity fungi/bacteriacide wash for industrial use in premises where exacting standards of hygiene are required has been developed by Liquid Plastics Ltd of Preston, Lancashire. Called Biocidal Wash, it can be used for cleaning down walls and ceilings before they are redecorated.

Previously, where high standards of hygiene were needed – in the food and drink industries for example – concern was shown over the high toxicity level encountered in conventional

Mantis is a one-man submersible with a work frame for attaching tools, TV camera and lights.

bacteria and mould killers. This was frequently coupled with the need to wash off the excess solution after it had dried. There was also concern about the limited active life of conventional treatments which provided short-term protection only from infection.

It is claimed that Biocidal Wash overcomes these problems. It can be applied safely to all normal substrates; is virtually odourless; has no more injurious effect on metalwork than water; does not need washing down after application; can be applied by brush or spray and experiments show that its effective life-span is in excess of two years. Tests conducted to the relevant British Standard showed no re-growth of heavily contaminated areas after treatment.

Further information: circle 714

Tough cross-country vehicles with all-wheel drive

Cross-country vehicle with a patented lightweight space frame construction for torsional strength, all-wheel drive, and automatic transmission fitted as standard are being introduced by Stonefield Vehicles. Types currently available are a cab and chassis unit, an enclosed personnel carrier and a soft-topped body with a fold-flat windscreen for military use, but the basic unit is of flexible design and a wide range of bodies can be built on to it.

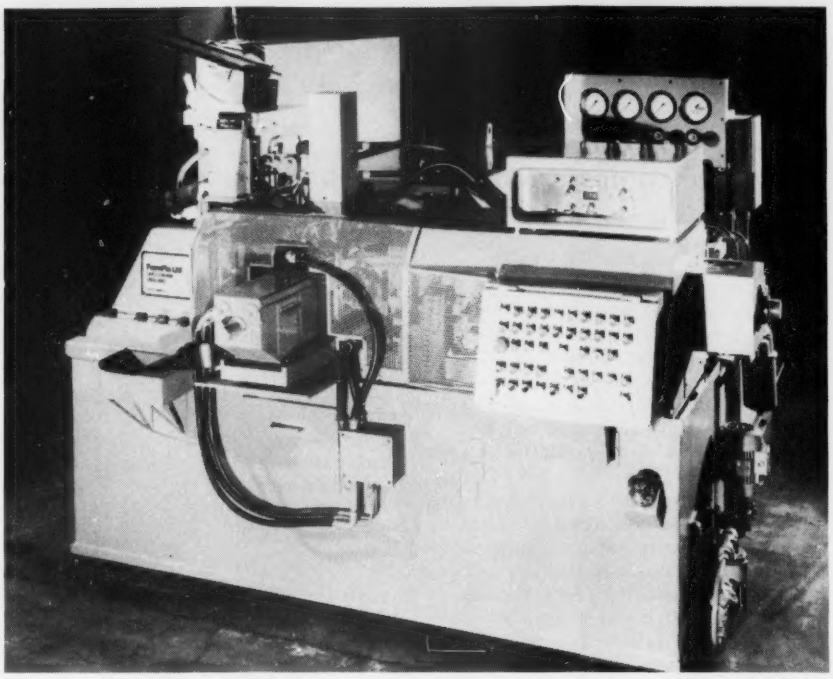
The vehicles are fitted with the Ferguson-4, a four-wheel drive which enhances the automatic transmission by dividing the driving torque to the front and rear wheels. The system senses wheel spin, diverting usable power to wheels still with adhesion. Suspension is designed to deal with all types of rough ground and the drum brakes are operated by a dual-line system with vacuum assistance.

Power units are standard 3 litre Ford and 5.3 litre Chrysler engines and the design of the vehicle is such that a selection of existing components commercially available can be fitted as replacements.

Further information: circle 715

Stonefield cross-country vehicles are designed to negotiate off-the-road conditions – including streams up to 750 mm deep.

Cold roll forming system is first for bearings



First production proven system for the cold roll forming of inner bearing rings is announced by Formflo Ltd. The process cuts out most waste usually associated with bearing rings turned from tube and, the manufacturer claims, rings made by it are stronger, truer, more consistent and cheaper to produce.

Further information: circle 716

External sensor protects pumps from damage

Now available from Mono Pumps Ltd, a new Sensaflo pump protection unit has been developed to prevent damage to pump components caused when running dry. It is an externally mounted flow sensing transducer system, generating a signal in response to an interruption in product flow which can be used to switch off the pump motor, sound an alarm or start/stop associated process plant.

As the sensor itself is mounted on the outside of the pipework there are no related corrosion or abrasion problems, and no resultant head loss. The Sensaflo unit can be applied to most pumps, handling both clean liquids and slurries. It can be supplied to fit existing pumps in service, or as original equipment.

The small transducer head operates as a transmitter and receiver, detecting the Doppler shift in frequency of reflected ultrasonic sound waves. It is bonded to the suction side of the pump, 'viewing' the rotor head and other moving parts, with the liquid acting as a coupling medium for the ultrasonic signal. Thus the system continuously monitors flow conditons within the pump and gives positive results without relying on the presence of solid particles or gas bubbles within the liquid being pumped.

The system consists of three basic components, namely the transducer head, a connecting cable, and the control unit. The transducer head is fitted with a standard BNC connector, to facilitate pump maintenance or change pump position. The connecting co-axial cable, protected by a flexible waterproof conduit, links the head with the control unit, which houses the solid state control circuitry in a compact tough pressed steel case.

The system has been specially designed to combine robustness with optimum sensitivity, ensuring efficient, reliable and repeatable operation under the arduous working conditions of many pumping environments.

Further information: circle 717

Technology news

British firms win advanced technology engine testing contract

A £1 million Nato order for the design and construction of jet engine test facilities has been won by three British companies. Industrial Acoustics Co Ltd, has been chosen as the main contractor and project manager, with John Curran Ltd and Marconi Avionics Ltd as sub-contractors. The production contract following completion of the prototype is estimated to be the largest order of its kind for noise controlled jet engine test facilities.

The test facilities will comprise all the elements needed for the complete performance testing of the Turbo-Union RB 199 turbofan engine which powers the Tornado multi-role combat aircraft. Up to 15 of the facilities will be sited at British air force bases in the UK and Germany and Italian air force bases in Italy.

The facility comprises a special acoustic enclosure complete with air-intake silencer, and advanced technology air-cooled exhaust silencers and an overhead engine test bed with pre-rigged engine 'wheel in' facilities, and a fully instrumented soundproof control cabin in which the new computerised engine test system is to be housed. Non-military applications of this technology would be in the noise control and operation of marine engines and gas turbine electricity generators.

Industrial Acoustics technical director, George Dawson said: 'Any increase in the speed and efficiency with which engine testing can be carried out enables the engine to be used for a greater proportion of its life doing the job it was designed for, and also saves fuel and manpower. Thus, efficient jet engine testing makes an important contribution to the cost effectiveness of an aircraft's total operation.'

His company's noise control system accepts the total jet efflux of the RB 199 in re-heat condition and attenuates the noise by 55 dBA to 65 dBA at 200 m. The exhaust silencers are air cooled and by means of a specially designed diffuser and augmentor tube reduce the temperature of the exhaust gases to acceptable levels, thus eliminating the necessity for water cooling with its complicated water storage, pipework and pumping systems. Every precaution is taken by the design engineers to ensure a completely maintenance-free system. The overall test facility is of demountable modular construction.

Computerised jet engine testing, by Marconi Avionics' automatic power plant test and monitoring system (APT) reduces a complex procedure to manageable proportions for 'field' use. It enables an operator, working in a control room adjacent to the test cell, to proceed rapidly through the test schedule which involves the measurement of 168 parameters.

The APT system, which comprises a computer, program unit, engine interface electronics and electronic keyboard displays, contains, in its computer program, the complete engine test specification and test procedures. Step-by-step instructions are presented on an electronic display to the operator by the computer. The computer continuously calculates the engine test data, a task which previously involved lengthy manual calculations throughout the test process, and automatically warns the operator should an engine be faulty, enabling him to take rapid action to prevent consequent damage.

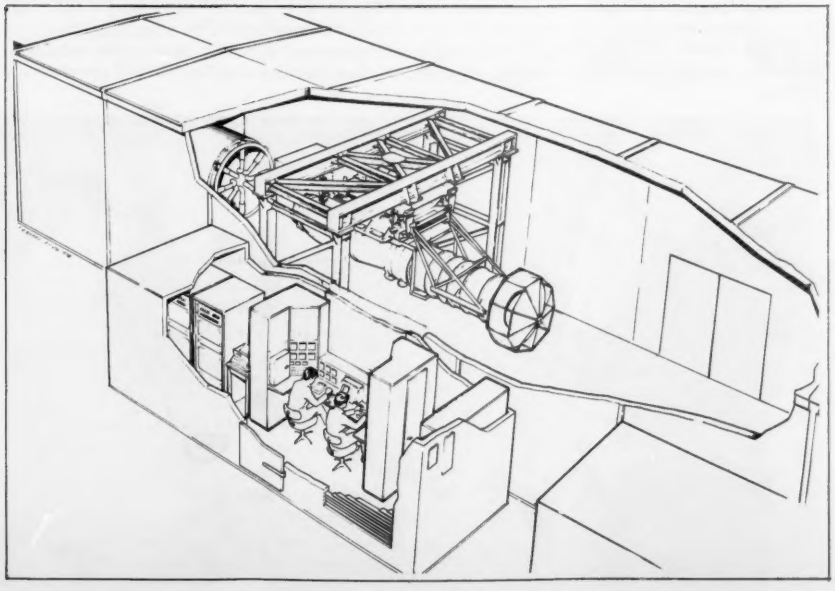
The flexibility inherent in the design of the system enables it to be adapted to the testing of different kinds of engine and to cater for any engine up-rating which may take place. The system is currently employed by military services for testing Adour engines.

John Curran Ltd are to provide the test bed designed on the pre-rigging and instant coupling system. This enables a maximum down time of 30 minutes to be achieved.

A workshop pre-rigged engine in its mounting frame is delivered, on a special trolley, to the test cell to a position below the test bed. Four console-controlled lockbolts then raise the engine and mounting frame, located by dowels, and clamp it into the test bed. Simultaneously all engine connections, fuel, air and electrics are made by means of four coupling plates on the mounting frame and test bed.

The combined jet engine testing facility offers many benefits, including protection of the environment from noise; safeguarding of operatives against noise induced hearing loss; rapid preparation of engine for test; and engines can be tested more quickly with fuel saved and more engines tested per day.

The RB 199 engine mounted on the John Curran test rig within Industrial Acoustic's special enclosure. In front is the soundproof control cabin housing Marconi Avionics' ATP system.



Efficient handling of paper saves waste and accidents

Less waste and fewer accidents could result from taking the advice given in a new booklet, 'Paper handling and storage', jointly published by three organisations representing the paper and printing industries. This fact is emphasised in the foreword to the booklet which is addressed to all who handle, store and transport paper and board, whether at the mill, in the merchant's warehouse, or in the printer's works or the converting factory.

The booklet says that while waste could never be entirely eliminated much can be done to reduce it, thereby making firms more competitive and improving security of employment.

The characteristics of paper that make it susceptible to damage are described in the booklet. It also shows how most of the hazards can be avoided by good packing, marking, handling, stacking, storing and moving in transit and after delivery. Documentation has a chapter to itself, as poor documentation is a great time-waster; and there is a section on what to do about unavoidable waste.

Copies of the booklet may be obtained from any of the following sponsoring organisations:

British Paper and Board Industry Federation, Plough Place, Fetter Lane, London EC4A 1AL; National Association of Paper Merchants, 35 New Bridge Street, London EC4V 6BH; and British Printing Industries Federation, 11 Bedford Row, London WC1R 4DX.

Atom-splitting machine saves lives

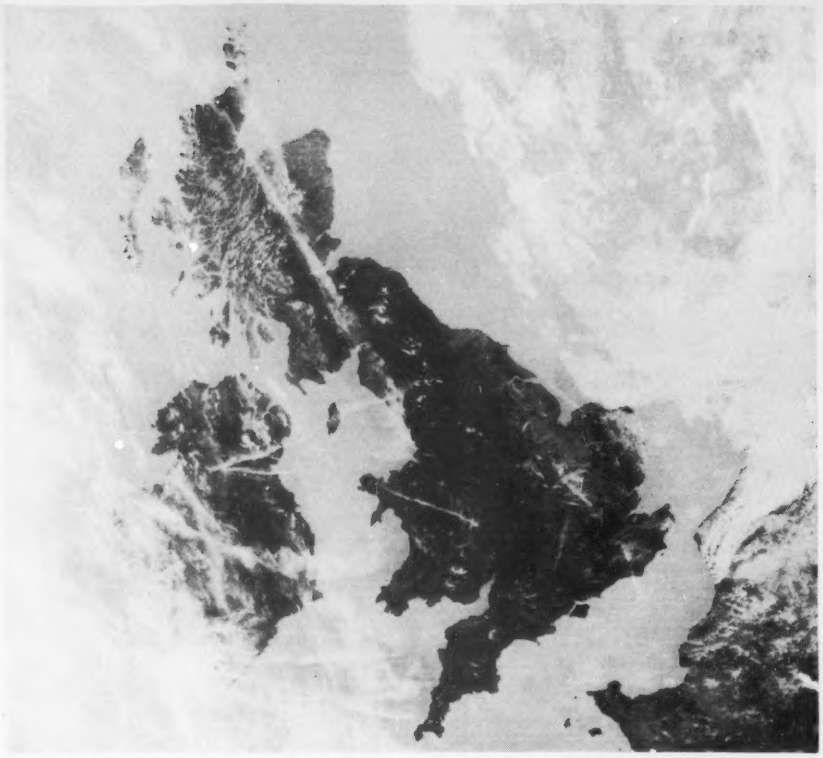
A £1 million cyclotron unit at the Western General hospital in Edinburgh bombards a cancerous tumour with a rapid stream of neutrons that can reach the 'target' without damaging surrounding healthy tissue. It is the first unit to be based entirely on the new fast neutron therapy treatment of cancer in place of conventional radiotherapy methods. It is also the first unit in the world to be fitted with a steerable beam which can fire its concentrated high-speed neutron stream at a patient's body from all angles. This is expected to increase considerably the success rate in treating deep-seated cancerous tumours or primary tumours that have resisted conventional treatment. The machine has successfully treated patients who have not responded to any other treatment.

Satellite images of UK taped by university

High-resolution satellite scanning radiometer images of the UK and surrounding areas – of particular interest to meteorologists and oceanographers – are being produced on a regular basis by the University of Dundee's electrical engineering department. Dundee started the service two years ago and have been continuously recording data from the American National Oceanic and Atmospheric Administration's weather satellite, NOAA5, ever since. The project is funded by the Natural Environment Research Council and images are available to anyone who is working on an approved environmental sciences project in a UK university or research institute. Commercial concerns are charged a fee for the service.

The satellite analogue data signals are recorded on a 14-track SE7000A high-performance instrumentation tape recorder supplied by SE Labs (EMI). Running at 30 ips, it enables a ground area approximately 4200 nm N-S × 2400 nm E-W to be scanned and kept in a tape archive for future reproduction as photo-facsimile images as requested by users.

First prototype in the next generation of television and infra-red operational satellites (TIROS) is to be launched shortly. This new American weather satellite, TIROS-N will be tranmitting its high-resolution data in digital form. Dundee University will use a wideband version of the recorder, the SE7000M, with high-density digital-recording capability. This will be used to record and archive data from the five-channel advanced very-high resolution radiometer, two channels responding to reflected visible sunlight and three channels to radiated infra-red heat.



A recent photofacsimile image of the United Kingdom from data recorded by Dundee University.

Tyre testing facility commissioned at Rapra

Visitors to the open days held at Rapra, the International Technical Centre for Rubbers and Plastics, on 20 to 22 June were able to see a number of new facilities, including a tyre tesing machine designed at Rapra and commissioned in May. Mr S. R. Badley (left) Rapra's chairman explains that this facility has been introduced to meet the requirement for an independent tyre testing authority, and has already been used for evaluations of additives, service life, adhesion, structural strength and thermal stability. The machine has also been applied to tests on conveyor belting.

Parliament

Monday, 26 June

Public appointments

Gwilym Roberts (Cannock) asked the Secretary of State for Industry, for Trade and for Prices and Consumer Protection how many full-time and part-time appointments, respectively, were made by them which were not subject to regulation by the Civil Service Commission; what was the total sum paid annually as salary and expenses for such appointments; and if they would take steps to reduce the number of posts.

For the Department of Industry, Mr Huckfield said that he assumed that the questioner referred to the appointments to the various public bodies for which the secretary of state was responsible. There were 31 full-time appointments, all salaried, and 455 part-time appointments, of which 46 were salaried. The total sum paid annually in salaries was £727,102. Comprehensive information on expenses was not readily available. The number of appointments was kept under review. Moreover, in certain cases, for example the committee of inquiry into the engineering profession, the appointments ended with the completion of the assigned task.

Mr Dell, Secretary of State for Trade, said that he had made 15 full-time appointments, all salaried and 254 part-time appointments, of which 41 were salaried, to the public bodies for which he was responsible. The annual salaries totalled £345,264. Comprehensive information an expenses was not readily available. The number of appointments was kept continually under review.

Mr Hattersley, Secretary of State for Prices and Consumer Protection, said that he was responsible for making three full-time appointments, all salaried, and 1201 part-time appointments, of which 109 were salaried. The annual salaries totalled £292,890. Comprehensive information on expenses was not readily available. The number of appointments was kept under review.

Agricultural equipment

Michael Mates (Petersfield) asked how many fork lift trucks, high lift trucks and digger loaders had been imported for the last convenient period; and under which tariff code.

Mr Meacher gave the following available information for the period January to May 1978:

Trade description	Code no.	No. imported
Works trucks and tractors, fitted with self-actuated lifting equipment with a lifting height of 1 m or more (other than side loaders for top lifting freight containers and straddle carriers)		
with electric motors	8707 2199	1327
with other motors	8707 2399	1321
	ex SITC(R2)744.11	
Integrated tractor digger combinations (ie rear diggers, tractor mounted)	8423 1140	388
	ex SITC(R2)723.42	

Note: It is believed that most vehicles imported under code numbers 8707 2199 and 8707 2399 are fork lift trucks.

Import duty on fish

Roger Moate (Faversham) asked why a Norweigan cod faces an import duty of 15 per cent. whilst an Icelandic cod faces a duty of 3.7 per cent.

Mr Meacher replied that in the special circumstances of the EEC/Iceland agreement, a concession for cod was permitted at the reduced rate of 3.7 per cent.

Trade with Vietnam

Gwilym Roberts (Cannock) asked the Secretary of State for Trade if he would consider providing export credit guarantees for trade with Vietnam.

Mr Meacher answered that export credit guarantees were available for trade with Vietnam. The Export Credits Guarantee Department was prepared to cover, subject to normal underwriting criteria, trade credits of up to six months and small orders of plant and machinery on commercial terms. A limited volume of cover was also available for larger orders of capital goods under section 2 of the Export Guarantees Act.

Japanese imports

Leslie Spriggs (St Helens) asked whether imports from Japan were monitored as they enter the United Kingdom.

Mr Dell said they were through the overseas trade statistics. His department kept a close watch on imports of sensitive products and their shipments from Japan.

Imports from EEC

Dafydd Wigley (Caernarvon) asked the Secretary of State for Trade if he would publish a table indicating the volume and value of imports from EEC countries for 1977-78 of butter, cheese, pigmeat and beef.

Mr Meacher said that in the period June 1977 to May 1978 imports from EEC countries were as follows:

	Quantity (tonnes)	Value (£'000 cif)
Butter	205 985	261 392
Cheese and curd	116 371	126 783
Beef and veal	207 799	197 561
Meat of domestic swine, fresh, chilled or frozen	15 933	12 384

Source: UK Overseas Trade Statistics – SITC 011.1, 011.3, 023.0 and 024.0.

Guarantors

Dafydd Wigley (Caernarvon) asked the Secretary of State for Prices and Consumer Protection if he was satisfied with the protection afforded to individuals who may be misled, pressurised or bullied into acting as a guarantor without appreciating the full implication of so doing; and if he would consider tightening the legislation which protects citizens in such matters.

Mr Fraser said that the Consumer Credit Act 1974, when fully operative, would give adequate protection to guarantors. In particular, he expected regulations to be made under that act to require security instruments to contain a warning of their implications at the place for the guarantor's signature.

Tuesday, 27 June

Food prices

Wyn Roberts (Conway) asked what had been the percentage increase in the food price index to the latest available date since February 1974.

Mr Maclennan said that between 19 February 1974 and 16 May 1978 the index of retail food prices rose by 101.4 per cent. Comparison over such a protracted period was of limited value since it gave no indication of underlying price trends. For instance at May 1978 the increase over the previous year was 7.0 per cent. In previous years the last time the 12 month index was as low as that was July 1972 when it stood at 6.8 per cent.

Retail prices

Wyn Roberts (Conway) asked what had been the percentage increase in the retail price index to the latest available date since February 1974.

Mr Maclennan replied that between 19 February 1974 and 16 May 1978, the retail price index rose by 92.4 per cent. The trend of inflation had varied considerably over that time; for example the annual increases in the RPI for the month of May in 1974, 1975, 1976, 1977 and 1978 had been 16.0, 25.0, 15.4, 17.1 and 7.7 per cent respectively.

Three monthly percentage increase

John Moore (Croydon Central) asked the Secretary of State for Prices and Consumer Protection if he would publish a table showing for each month since October 1974 the three-monthly percentage increase in the following indices expressed at an annual rate: (a) the Price Commission index, (b) the all-items index of retail prices and (c) the wholesale price index.

Mr Maclennan said that the information, for what it was worth, was given below. As he had often stated, and as the volatility of the figures showed, three months was too short a period for the reliable assessment of trends.

THREE-MONTHLY PERCENTAGE INCREASE EXPRESSED AT AN ANNUAL RATE

Price Commission index	1974	1975	1976	1977	1978
January		27.0	18.8	16.1	7.4
February		33.7	11.0	14.8	9.0
March		29.6	12.9	18.8	7.3
April		18.2	11.4	18.7	7.2
May		10.2	9.1	17.4	4.5 p
June		11.7	13.6	11.5	
July		19.9	13.9	10.3	
August		21.1	15.5	6.1	
September		17.9	13.2	4.1	
October	10.3	12.2	20.0	4.4	
November	20.6	17.6	23.4	5.5	
December	25.9	20.7	23.1	7.7	
Retail price index; all items					
January		25.9	16.0	21.8	6.6
February		23.4	15.2	21.6	7.0
March		26.4	12.2	19.9	7.4
April		34.4	16.0	19.6	11.2
May		53.1	15.2	18.6	11.1
June		48.0	15.1	19.0	
July		32.5	7.5	8.7	
August		15.1	8.8	6.8	
September		10.3	12.3	4.7	
October	13.4	12.1	19.7	5.6	
November	23.1	14.8	19.7	6.0	
December	24.2	18.1	19.7	5.9	
Wholesale price index; outputs					
January		29.6	16.8	28.5	9.3
February		38.1	18.0	25.3	11.0
March		39.6	14.9	25.0	11.1 p
April		40.6	13.7	18.3	8.5 p
May		37.6	15.3	20.0	7.7 p
June		23.7	17.1	19.8	
July		21.7	16.6	17.3	
August		13.9	17.0	13.4	
September		13.1	18.3	10.8	
October	24.8	11.5	19.9	8.1	
November	24.4	11.6	21.6	5.9	
December	24.8	14.2	20.7	6.2	

p = provisional

Ministers

Department of Industry

Secretary of State: Eric Varley
Ministers of State: Alan Williams
Gerald Kaufman
Parliamentary Under-Secretaries of State: Robert Cryer
Leslie Huckfield

Department of Trade

Secretary of State: Edmund Dell
Parliamentary Under-Secretaries of State: Michael Meacher
Stanley Clinton Davis

Department of Prices and Consumer Protection

Secretary of State: Roy Hattersley
Minister of State: John Fraser
Parliamentary Under-Secretary of State: Robert Maclennan

Price rises in EEC

David Knox (Leek) asked the Secretary of State for Prices and Consumer Protection what was the percentage rise in: (a) consumer prices and (b) food prices in 1977 in the following member states of the EEC: Belgium, Luxembourg, the Netherlands, Denmark and Ireland.

Mr Maclennan gave the following information:

INCREASES IN RETAIL PRICES IN 12 MONTHS TO DECEMBER 1977

	Consumer prices % increase	Food prices % increase
Belgium	6.3	4.0 [3]
Luxembourg	4.4 [1]	0.5 [3]
Netherlands	5.4	4.0
Denmark	12.3	12.2
Ireland [2]	10.8	11.9

Notes: [1] excluding restaurant meals, and rent. [2] 12 months to November 1977. [3] Includes beverages. Source: OECD Main Economic Indicators.

UK share of world trade

John Pardoe (North Cornwall) asked the Secretary of State for Trade if he would publish the United Kingdom's share of world trade in manufactured goods for each year since 1948 to date, together with the comparative figures for the United States of America, France, West Germany and Japan.

Mr Meacher said that the conventional measure of a country's share of trade in manufactured goods was in terms of its value share in exports of manufactures by the main manufacturing countries (MMCs). The following table was on this basis. Reliable information was not available prior to 1955. Precise information on shares in world exports would be costly to assemble, but over the period 1971 to 1975 the MMCs accounted for around three-quarters of world exports of manufactured goods.

PERCENTAGE SHARE OF MAIN MANUFACTURING COUNTRIES [1]
EXPORTS OF MANUFACTURED GOODS [2]

	UK	USA	France	West Germany	Japan
1955	19.9	24.4	9.3	15.4	5.1
1956	19.4	25.2	7.8	16.4	5.6
1957	18.4	25.3	8.0	17.5	5.9
1958	18.3	23.2	8.6	18.5	6.0
1959	17.9	21.1	9.2	19.0	6.7
1960	16.5	21.6	9.6	19.3	6.9
1961	16.4	20.5	9.4	20.2	6.8
1962 [3]	15.9	20.3	9.2	19.9	7.4
1962 [3]	15.5	21.9	9.0	19.5	7.2
1963	15.3	21.3	9.0	19.8	7.5
1964	14.2	21.5	8.7	19.4	8.2
1965	13.8	20.3	8.8	19.2	9.4
1966	13.2	20.2	8.6	19.4	9.7
1967	12.2	20.4	8.5	19.6	9.8
1968	11.3	20.2	8.2	19.5	10.6
1969	11.2	19.3	8.2	19.6	11.2
1970	10.6	18.6	8.8	19.9	11.7
1971	10.9	17.0	8.8	20.1	13.0
1972	10.1	16.2	9.3	20.2	13.2
1973	9.4	16.0	9.6	22.1	12.7
1974	8.8	17.0	9.2	21.6	14.4
1975	9.3	17.7	10.2	20.3	13.6
1976	8.7	17.2	9.7	20.6	14.6
1977 p	9.3	15.7	9.8	20.7	15.5

Notes: [1] The main manufacturing countries are taken as the United Kingdom, West Germany, Belgium/Luxembourg, France, Italy, Netherlands, Sweden, Switzerland, USA, Canada and Japan. [2] Manufactured goods are defined as SITC (R) 5 to 8. [3] There is a discontinuity at 1962 as a result of a change in the coverage of US special category exports. p = provisional. Sources: Monthly Review of External Trade Statistics table C2; OECD; UN Monthly Bulletin.

Names of foreign companies

John Lee (Birmingham, Handsworth) asked the Secretary of State for Trade if he was satisfied with the operation of section 31 of the Companies Act regarding the name style of foreign companies operating in the United Kingdom.

Mr Clinton Davis said: yes. He added that since this section of the Companies Act 1976 came into force on 18 April 1977, the Registrar of Companies had served notices on 79 overseas companies carrying on business in this country under a name he considered undesirable. Forty-nine of these companies were using the word 'bank' in their name; most of the remainder had names thought to be over-similar to those of other companies already registered here. Apart from a few cases which were being pursued, the companies receiving notices had either ceased operations in this country, or had adopted, or were in the process of adopting, names acceptable to the department.

Shipbuilding

John Pardoe (North Cornwall) asked the Secretary of State for Industry, if he would publish a table showing shipbuilding production in the United Kingdom for every year since 1948 together with the percentage share of world output this represented and the comparative figures for the United States of America, France, West Germany and Japan.

Mr Huckfield gave the following information:

COMPLETIONS OF MERCHANT VESSELS OF 100 GROSS TONS OR OVER, 1948–77

	United Kingdom		USA		France		West Germany		Japan	
	Million gross tons	Per cent share of world	Million gross tons	Per cent share of world	Million gross tons	Per cent share of world	Million gross tons	Per cent share of world	Million gross tons	Per cent share of world
1948	1.2	49	0.2	7	0.1	3	na	na	na	na
1949	1.4	43	0.6	18	0.2	5	na	na	0.1	3
1950	1.4	43	0.4	12	0.2	5	0.1	2	0.2	7
1951	1.3	38	0.2	4	0.2	5	0.3	7	0.4	12
1952	1.3	30	0.4	9	0.3	6	0.5	12	0.5	12
1953	1.2	25	0.6	12	0.2	5	0.7	14	0.7	15
1954	1.5	27	0.6	10	0.3	5	0.9	16	0.4	8
1955	1.3	27	0.1	2	0.4	7	1.0	19	0.6	11
1956	1.5	23	0.1	2	0.3	4	1.1	17	1.5	24
1957	1.4	18	0.3	4	0.5	6	1.2	15	2.3	28
1958	1.5	16	0.6	6	0.4	5	1.4	15	2.2	25
1959	1.4	16	0.8	9	0.4	5	1.2	14	1.7	20
1960	1.3	15	0.4	5	0.4	5	1.1	13	1.8	22
1961	1.4	17	0.4	5	0.5	7	1.0	13	1.7	21
1962	1.0	12	0.4	5	0.5	6	1.0	12	2.1	25
1963	1.1	12	0.4	5	0.5	6	1.1	12	2.3	25
1964	0.8	8	0.2	3	0.5	5	0.8	9	3.8	39
1965	1.3	11	0.2	2	0.5	4	1.0	9	4.9	42
1966	1.1	8	0.2	1	0.4	3	1.2	8	6.5	46
1967	1.2	8	0.2	1	0.4	3	1.0	7	7.2	48
1968	1.0	6	0.4	2	0.6	4	1.2	7	8.3	50
1969	0.8	4	0.5	2	0.7	4	1.8	10	9.2	49
1970	1.3	6	0.4	2	0.9	4	1.3	6	10.1	48
1971	1.2	5	0.5	2	1.1	4	2.0	8	11.1	46
1972	1.2	4	0.5	2	1.0	4	1.4	5	12.9	48
1973	1.1	4	1.0	3	1.2	4	1.9	6	14.8	49
1974	1.2	4	0.7	2	1.0	3	2.1	6	16.9	50
1975	1.2	3	0.5	1	1.2	3	2.5	7	17.0	50
1976	1.5	4	0.8	2	1.7	5	1.9	6	15.9	47
1977	1.0	4	1.0	4	1.1	4	1.6	6	11.7	43

Source: Lloyds Register of Shipping. na = not available

Motor vehicles

John Pardoe (North Cornwall) asked for a table showing motor vehicle production in the United Kingdom for every year since 1948 together with the percentage share of world output this represented the comparative figures for the United States of America, France, West Germany and Japan.

Mr Cryer gave the following information:

MOTOR VEHICLE PRODUCTION 1948-77

	United Kingdom		USA		France		West Germany		Japan	
	000s	Per cent share of world	000s	Per cent share of world	000s	Per cent share of world	000s	Per cent share of world	000s	Per cent share of world
1948	512	8	5 288	82	198	3	61	1	21	—
1949	631	8	6 254	80	286	4	162	2	31	—
1950	785	8	8 003	80	358	4	306	3	33	—
1951	735	8	6 768	75	446	5	374	4	39	—
1952	690	9	5 539	71	499	6	428	5	39	—
1953	835	8	7 323	74	497	5	491	5	47	—
1954	1 039	10	6 601	65	600	6	681	7	61	1
1955	1 238	9	9 169	68	725	5	909	7	60	—
1956	1 006	9	6 921	60	827	7	1 073	9	101	1
1957	1 151	9	7 221	59	928	8	1 212	9	175	1
1958	1 364	12	5 135	46	1 128	10	1 495	14	182	2
1959	1 560	11	6 729	49	1 283	9	1 719	13	263	2
1960	1 810	11	7 869	49	1 369	8	2 055	13	482	3
1961	1 464	10	6 677	45	1 244	8	2 148	14	814	5
1962	1 675	9	8 188	45	1 536	8	2 357	13	991	5
1963	2 012	10	9 101	44	1 737	8	2 668	13	1 284	6
1964	2 332	11	9 [illegible]39	42	1 616	7	2 910	13	1 702	8
1965	2 177	9	11 057	45	1 642	7	2 976	12	1 876	8
1966	2 042	8	10 329	42	2 025	8	3 051	12	2 286	9
1967	1 937	8	8 976	38	2 010	8	2 482	10	3 146	13
1968	2 225	8	10 820	38	2 076	7	3 107	11	4 086	15
1969	2 183	7	10 205	35	2 459	8	3 605	12	4 674	16
1970	2 098	7	8 284	29	2 750	10	3 842	13	5 289	18
1971	2 198	7	10 672	32	3 010	9	3 983	12	5 811	18
1972	2 329	7	11 311	32	3 328	9	3 816	11	6 294	18
1973	2 164	6	12 682	33	3 596	7	3 949	10	7 083	19
1974	1 937	6	10 071	30	3 075	9	3 100	9	6 552	19
1975	1 648	5	8 989	28	2 861	9	3 168	10	6 942	22
1976	1 706	5	11 491	31	3 403	9	3 868	10	7 841	21
1977	1 714	na	12 696	na	3 508	na	4 102	na	8 515	na

[1] excludes 3-wheelers; na = not available. Source: Society of Motor Manufacturers and Traders.

Wednesday, 28 June

UK trade balance

David Knox (Leek) asked the Secretary of State for Trade if he would publish a table showing for each year since 1945: (a) the surplus or deficit on the current balance of the United Kingdom balance of payments per capita, (b) the surplus or deficit on the invisible account of the United Kingdom balance of payments per capita and (c) the surplus or deficit on the invisible trade account of the balance of payments per capita.

Mr Meacher gave the following figures:

CURRENT ACCOUNT, VISIBLE AND INVISIBLES BALANCES PER CAPITA 1946-1977 [1] £

	Current account balance	Visible balance	Invisibles balance
1946	−4.67	−2.09	−2.58
1947	−7.68	−7.28	−0.40
1948	+0.52	−3.02	+3.54
1949	−0.02	−2.72	+2.70
1950	+6.06	−1.01	+7.07
1951	−7.29	−13.62	+6.33
1952	+3.21	−5.50	+8.71
1953	+2.85	−4.80	+7.65
1954	+2.29	−3.99	+6.28
1955	−3.03	−6.11	+3.08
1956	+4.04	+1.03	+3.01
1957	+4.51	−0.56	+5.07
1958	+6.63	+0.56	+6.07
1959	+2.97	−2.21	+5.18
1960	−4.66	−7.63	+2.97
1961	+0.42	−2.64	+3.06
1962	+2.40	−1.87	+4.27
1963	+2.44	−1.49	+3.93
1964	−6.59	−9.25	+2.66
1965	−0.48	−4.10	+3.62
1966	+1.90	−1.21	+3.11
1967	−5.46	−10.10	+4.64
1968	−5.20	−12.09	+6.89
1969	+7.94	−2.82	+10.76
1970	+12.79	−0.45	+13.24
1971	+19.28	+5.01	+14.27
1972	+2.25	−12.55	+14.80
1973	−15.77	−42.04	+26.27
1974	−62.76	−92.75	+29.99
1975	−28.88	−57.25	+28.37
1976	−15.35	−62.72	+47.37
1977	+2.95	−28.83	+31.78

[1] No official, comparable figures are available for 1945.

Cattle and sheep imports

Donald Stewart (Western Isles) asked from which countries live cattle and sheep were imported into the United Kingdom; and what was the volume from each for the last available 12 month period.

Mr Meacher gave the following information for the period May 1977 to April 1978:

CATTLE	Number
Irish Republic	342 134
Australia	35
France	28
Total	342 197

SHEEP	Number
Irish Republic	67 167
France	71
Austria	2
Total	67 240

In the period June 1977 to May 1978, 337 117 live cattle and 70 805 live sheep were imported. Details of imports from individual countries in May 1978 were not yet available.
Source: UK Overseas Trade Statistics – SITC (Rev 1) 001.1 and 001.20 (part); SITC (Rev 2) 001.1 and 001.21.

Geraint Howells (Cardigan) asked how many live cattle were imported from Northern Ireland in 1977; and what were the corresponding numbers for the last 10 years. He also asked how many live cattle were imported from Ireland in 1977; and what were the corresponding numbers for the last 10 years.

Mr Meacher replied that information on imports into Great Britain from Northern Ireland was not available from the UK overseas trade statistics. Following were figures of the numbers of live cattle (a) sent from Northern Ireland to Great Britain and (b) imported into the United Kingdom from the Irish Republic:

	(a) Sent from Northern Ireland to Great Britain [1]	(b) UK imports from Irish Republic [2]
1968	110 168	620 107
1969	102 500	553 865
1970	83 003	523 173
1971	94 489	618 596
1972	52 849	491 938
1973	45 988	341 128
1974	58 239	381 263
1975	76 424	501 544
1976	20 855	229 271
1977	1 266	304 036

Sources: [1] Northern Ireland Department of Agriculture (figures exclude cattle imported on direct consignment from the Irish Republic). [2] Overseas Trade Statistics of the United Kingdom (SITC (Rev 1) sub-group 001.1 – live animals of the bovine species).

Thursday, 29 June

Cost of raw materials

Arthur Lewis (Newham North West) asked the Secretary of State for Prices and Consumer Protection whether his recent statement on inflation took account of the 6½ per cent rise in the costs of raw materials during the past three months and the government's own estimate of an annual rate of 28 per cent; and what his estimate was of raw material price rises in the next six months.

Mr Maclennan replied that the secretary of state took into account all available information. The cost of raw materials and fuel purchased by manufacturing industry was still 1¾ per cent below its level of a year earlier. He expected no major upturn in world prices of raw materials in the next six months.

Assistance to Ipswich industry

Ken Weetch (Ipswich) asked what was the amount of financial assistance given to industry in Ipswich under the Industry Act 1972 since 1974.

Mr Williams replied that between 1 March 1974 and 30 April 1978 offers of selective financial assistance totalling £2,747,000 had been made under section 8 of the Industry Act 1972 in respect of 10 projects estimated to cost £15,330,000 in the Ipswich travel to work area.

Pentland Firth

Mr Grimond (Orkney and Zetland) asked the Secretary of State for Trade what would be the purpose of extra coastguard watch on the Pentland Firth when the whole area will soon be under radar surveillance.

Mr Clinton Davis said that he welcomed the decision of the Orkney Islands council to extend the range of their harbour radar. He was still considering whether the volume of traffic now using the Pentland Firth would justify any extension of coastguard activity in the area.

Friday, 30 June

Airport development

James Sillars (South Ayrshire) asked the Secretary of State for Trade what had been the amount of public expenditure on airport development in Scotland and England, respectively, over the past 10 years.

Mr Clinton Davis stated that in the 10 years ended 31 March 1978, government grants of £36.1 million in Scotland and £0.8 million in England had been made for the development of airports.

Public appointments

Iain Sproat (Aberdeen South) asked the Secretary of State for Trade what were the bodies for which his department was responsible which would fulfil all the criteria for inclusion in 'A Directory of Paid Public Appointments Made By Ministers' produced by the Civil Service Department, except for the fact that those appointed were not paid; in respect of which of these bodies expenses were paid; what those expenses amounted to in the last 12 months for which figures were available; and what were all the other main constituent costs.

Mr Dell said that the available information was shown below. In principle, all members whom he appointed were entitled to reimbursement of travel, subsistence and incidental expenses necessarily incurred in the course of carrying out the duties of the appointment.

	Members' expenses during 12 months to 31 March 1978	Other main constituent costs during the same period
Advisory committee for the national film development fund	Information not available: all costs are met by the National Film Finance Corporation out of its own resources.	
Advisory committee on historic wreck sites	£225	[1]
Advisory committee on pilotage	£7,400	£90
Air travel reserve fund agency	The only information available is in the agency's annual report and accounts which is laid before parliament	
British overseas trade advisory council	£298	£562 [1]
Distribution of statistics advisory committee	Nil	£356 [1]
Export guarantees advisory council	Nil	[1]
Insolvency law review committee	£2 784	£1 586 [1]
Insurance advisory panel	Nil	Nil
Insurance brokers' registration council	Information not available: no costs fall on public funds	
Interim action committee on the film industry	£510	£124
Northern lighthouse board	Information not available: all expenses are met from general lighthouse funds	
Overseas projects board	Nil	£168 [1]
Simplification of international trade procedures board	£636	£268 912
Working party to review tourist boards' accommodation guides	£95	£162 [1]

[1] In certain cases costs additional to any shown are incurred by officials in providing a secretariat, information on which is not readily available.

Iain Sproat (Aberdeen South) asked the Secretary of State for Prices and Consumer Protection what were the bodies for which his department was responsible which would fulfil all the criteria for inclusion in 'A Directory of Paid Public Appointments Made By Ministers', produced by the Civil Service Department, except for the fact that those appointed were not paid; in respect of which of these bodies expenses were paid; what those expenses amounted to in the last 12 months for which figures were available; and what were all the other main constituent costs.

Mr Fraser gave the following information. He said that in principle, all members whom the secretary of state appointed were entitled to claim reimbursement of expenses necessarily incurred in the course of carrying out the duties of their appointment.

£

	Members' expenses during the last 12 months for which figures are available	Other main constituent costs during the same period
Advisory committee on the safety of household electrical equipment	10	[1]
British hallmarking council	117	11 400
Tate and Lyle customer safeguards committee [2]	No information available: no costs fall on public funds	
Domestic coal consumers' council	6 000	17 000
Post Office users' council for Northern Ireland	550	8 000
Post Office users' council for Scotland	2 000	3 600
Post Office users' council for Wales	2 700	5 000
Inquiry into motorway service areas	2 084 [3]	[1]

[1] In certain cases, costs additional to those shown are incurred by officials in providing a secretariat, information on which is not readily available. [2] Committee set up jointly with Ministry of Agriculture, Fisheries and Food. [3] Costs shared with Department of Transport.

European community news

EEC mandate on MTNS meets UK interests – Dell

EEC foreign ministers agreed a community mandate for the final stages of the multilateral trade negotiations (MTNS) under the General Agreement on Tariffs and Trade (Gatt) at their meeting in Luxembourg on 27 June.

Secretary of State for Trade Edmund Dell, who represented the UK at the meeting, said that the mandate was a strong one which met the interests of the UK and was prepared with the firm intention of coming to an agreement with the United States and other trading partners. He said that it was significant that the community as a whole had been able to endorse the mandate, but pointed out that there had been differences of approach particularly in agriculture.

The main area of debate, Mr Dell said, had been on safeguards for emergency circumstances where it might be necessary to take action on a selective basis to prevent disruption in community markets. On the assumption that a selective safeguard was part of the final agreement, it would be possible for the UK to use a safeguard in such cases. The United States had accepted the principle of selective safeguards, but there was still disagreement about its form and there was therefore much negotiating still to be done.

On the question of subsidies and countervailing duties, Mr Dell said that the bargain had been that, in return for introducing the material injury criteria into their countervailing law, the United States had sought to improve existing international rules on subsidies. He explained that under present United States law there was no requirement to prove material injury and that, as a result, automatic countervailing duty could be imposed on all imports benefiting from a subsidy. The present position was safeguarded by a waiver on the full force of United States law, but this waiver expired at the end of the year. Mr Dell added that he was not prepared to allow the government's powers to use subsidies to be in any way constrained by the terms of the bargain.

On agriculture Mr Dell said that in order to secure any settlement, the UK had felt it necessary to obtain a better proposition from the community on Australian beef and New Zealand cheese.

Mr Dell said that other matters which had emerged from the discussion were the desire to get a better tariff offer from Japan, as this was at the moment unsatisfactory and the recognition of the need for a special position for developing countries. He pointed out that many other countries besides the United States and Japan were involved in the Gatt negotiations and he said that the negotiators would now have a tough time-table to meet if they were going to get agreement by 15 July in time for the industrial world economic summit in Bonn on 16 and 17 July.

More community news

Information on European community matters and about member states can often be found in other sections of *Trade and Industry*. For this week's additional news, turn to the following pages:

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Foreign ministers discuss Greek accession

Greek accession negotiations were the subject of a meeting before the foreign affairs council in Luxembourg on 26 June. Ministers noted that progress had been made in the capital movements, coal and steel and Euratom chapters; and the commission reported that they planned to propose draft mandates for the major outstanding chapters before the summer break.

Reporting on the meeting in a written statement to the commons on 28 June, Secretary of State for Foreign and Commonwealth Affairs David Owen said that the council, in the context of discussion of the common economic strategy, had noted that progress had been achieved in both national and community energy policies. The draft resolution on energy policy objectives for 1985 had been remitted to officials for further consideration.

Main outstanding points were settled in the regulation setting up the new regional development fund, he said. The UK stood to benefit from the new, more flexible rules governing the projects that could be financed by the fund.

On relations with Japan the council had reaffirmed the importance it attached to the Japanese government meeting its targets for increased growth and a reduced external surplus, and had instructed the commission to continue its consultations with the Japanese government to this end. A report of these consultations would be made to the European council in July.

Ministers had agreed that the pragmatic development of co-operation with Efta countries should be pursued. The UK welcomed this.

On steel ministers had agreed that more work was needed before conclusions could be reached on the commission's paper on revised general objectives for steel or on the commission's draft decision regulating state aids. The draft decision was due to be discussed again in July. Ministers also discussed the commission's proposed decision on sanctions against those infringing the community's minimum price regime for steel products. There had been general agreement on the substance of the decision, which the council hoped could soon be adopted.

The council had held an exchange of views on the general approach proposed by the commission in its communication to the council on the reorganisation of the European shipbuilding industry. The council would hold a further discussion on this in July.

A number of proposals for community action in respect of marine pollution had been agreed.

Ministers had agreed on a communication to the European assembly on preparations for direct elections, confirming the council's view on the proposed dates now that the relevant act had been ratified by all member states.

Directives were approved concerning the mutual recognition of formal qualifications in dentistry, to facilitate the exercise of the right of establishment and dentists' freedom to provide services within the community.

The UK delegation had stressed the political and economic arguments which required an early re-opening of community markets to beef exports from Botswana.

In a discussion of the levels of textile imports from Mediterranean suppliers it had been agreed that these matters should be pursued urgently.

Portuguese minister in London

Portugal's application to join the European community was among the subjects discussed during the visit of Portuguese Foreign Minister Dr Vitor Sa Machado to London on 29 and 30 June.

He met Secretary of State for Foreign and Commonwealth Affairs, David Owen, and

Minister of State at the Foreign and Commonwealth Office, Frank Judd. Dr Machado was in the UK to establish close links between the two countries. President of Portugal General Eanes is expected to pay a state visit to the UK on 14 to 17 November.

Draft directive on doorstep selling not acceptable – Fraser

In a commons debate dealing with a EEC draft directive on doorstep selling, John Fraser, Minister of State at the Department of Prices and Consumer Protection, said that the directive had serious defects and could have perverse results. 'It is not acceptable in its present form, and we shall press for it to be withdrawn unless it is substantially changed.' The commons was taking note of EEC documents nos. R/113/77 and R/134/78 on contracts negotiated away from business premises. The debate took place on 28 June.

Listing the defects of the draft directive Mr Fraser said the scope of the document – both the document and the proposed amendments – was diffuse and unclear.

As an example, Mr Fraser said that it was not certain how trade premises were to be defined.

'As it stands, it could apply to an auction in a private house or to a large sale perhaps at Mentmore which is far removed from what would normally be regarded as trade premises. It could, perversely, apply to the sale of a television set on hire purchase, for the technical reason that the television set is being sold by a finance company, not by the person who displays it in his window.'

Mr Fraser said he thought control of doorstep sales should apply only where the contract was not at the initiative of the customer – in other words, where the customer was taken by surprise. To frame it in any other way – whether they were UK proposals or EEC proposals – would rob consumers of the freedom or ability to strike a bargain or to obtain a service at a time when they wanted it and at the price they wanted to pay. The scope was too wide and the definitions were too diffuse and unclear, Mr Fraser said.

'I come next to the lower cash limit. Originally, it was £17 – roughly equivalent to the number of units of account. There is a proposal to reduce it still further. The lower cash limit in the directive is too low. It would be the subject of frequent change. It is totally unpredictable, because it is tied to units of account. It is not expressed in our currency. Therefore, it is not acceptable. In my view, it should be left to national judgment, perhaps within a band, to determine the cash limit. We would want this matter to be consistent with our own policy under the Consumer Credit Act.

'I am convinced that the law should be as simple as possible for both consumers and traders. To have a diversity – a variety – of cash limits for doorstep transactions, depending whether they are controlled under the Consumer Credit Act or are dealt with by European directives, some tied to sterling and others to monetary units of account, can only be confusing to the consumer. Therefore, it must be left to our national judgment to decide the starting point for the control.'

On mail order catalogue selling Mr Fraser explained that, in his view and in that of his department, if the draft should become a directive – and he did not mean in its present form – he did not believe that the controls in it should be inapplicable to mail order traders, but he did believe that they should be innocuous to them. The mail order trader ought to have no greater obligations and duties than he would have in any event under the provisions of the Consumer Credit Act for credit transactions and he ought not to have to assume more than broadly similar obligations for cash transactions.

'If that line were followed, I do not think that mail order traders would be inconvenienced by the imposition of a standard of protection which many of them already widely exceed. There is some merit, particularly of simplicity and fairness, if controls on contractual matters and on the law of credit are universally applicable.'

Mr Fraser said he took issue with the European commission whether this were an area where the commission should intervene. The matters in this directive barely involve intracommunity trade,' Mr Fraser said. 'Many of the hard-selling techniques seem to come from the other side of the Atlantic rather than from the other side of the channel.

'If the commission had not intervened – and this applies not only with this draft directive, but in other instances too – we would probably already have legislated in this country to deal with cash transactions on the doorstep as well as credit transactions. We have already legislated for credit with a cooling-off period. Shortly, canvassing for sales on credit will require special consent with a consumer credit licence.'

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Ministers consider help for young unemployed

European commission proposals for a new category of aid under the European social fund to promote employment of young people through support for recruitment subsidies and job creation programmes was considered by EEC ministers at the labour and social affairs council on 28 June, John Grant, Parliamentary Under-Secretary of State for Employment, told the commons in a written reply on 4 July. Although aspects of the proposals gave difficulties for most member states, the great majority of delegations, including the UK, were able to accept a compromise proposed by the Danish presidency. The minister said he was very disappointed that the compromise had not been acceptable to all delegations, and in the end it was not possible to reach final agreement. The presidency would report the outcome to the heads of government meeting in Bremen on 6 July.

The council agreed a resolution on an action programme on safety and health at work, Mr Grant said, and called for a number of measures in this area to be taken within the four year period to the end of 1982. A directive to protect the health of workers exposed to vinyl chloride monomer was also agreed.

In a statement on present commission programmes, Commissioner Vredeling had given a progress report on preparations for the tripartite conference to be held in the autumn, an account of the commission's present examination of ways to alleviate adverse employment effects of measures for industrial restructuring, and a statement on progress on setting up the European Trades Union Institute, Mr Grant told the house.

The Danish delegation placed before the council the question of the conduct of a company during an industrial dispute in Denmark. The council considered the question in relation to the freedom of movement for workers provided for in article 48 et seq of the Treaty of Rome. In its conclusions, Mr Grant said, the council drew attention to the declaration adopted by the governing body of the International Labour Organisation on 16 November 1977 that enterprises should not transfer workers from affiliates in foreign countries with a view to undermining bona fide negotiations with workers' representatives, or the workers' exercise of their right to organise.

EEC adopts directive on insurance qualifications

Measures to facilitate freedom of establishment and services for insurance agents and brokers in the nine member states, on the basis of mutual recognition of qualifications, are laid down in EEC directive 77/92/EEC, which came into effect on 1 July. The directive sets out the agreed qualifications, in particular length of experience, to be required of brokers and agents practising in one member state and wishing to do business in another. These qualifications are to be attested by certificates issued by the relevant supervisory authority in each member state.

UK insurance brokers and agents wishing to do business in another EEC member state (particularly Belgium, France and the Netherlands) should apply for information either to their professional associations or to the Certificates of Experience Unit, Department of Trade, London SW1, which will be able to provide applicants with a copy of the directive and will give any necessary advice on certification.

Article 100 scores a century

Foreign ministers meeting in Luxembourg on 26 and 27 June adopted the hundredth directive in the EEC's programme for eliminating technical barriers to trade in industrial products under article 100 of the treaty of Rome.

The directive deals with the approximation of the laws in member states on the classification, packaging and labelling of dangerous preparations (pesticides). It lays down provisions for the use of warning symbols where the toxicity of a preparation exceeds a defined level. It also stipulates the use of warning phrases on the labels of such preparations; although it allows that additional phrases may be used at the discretion of member states.

A checklist of draft and adopted directives dealing with the elimination of techical barriers to trade in industrial products, also food law harmonisation directives, is published quarterly in *Trade and Industry*. The last checklist appeared in *Trade and Industry*, 28 April, page 218.

UK appoints inspection organisations

The Health and Safety Executive has appointed the following inspection organisations, for Great Britain, as required by article 13 for the purposes of article 22 of the EEC framework directive 76/767 on pressure vessels.

British Engine Boiler and Electrical Insurance Co Ltd, Longridge House, Manchester M60 4DT: Commercial Union Assurance Co Ltd, Engineering Department, PO Box 232, Pembroke House, 40 City Road, London EC1P 1EE; Lloyd's Register Industrial Services, Norfolk House, Croydon CR9 2DT; National Vulcan Engineering Insurance Group Ltd, St Mary's Parsonage, Manchester M60 9AP; Scottish Boiler and Generai Insurance Co Ltd, Windsor House, 250 St Vincent Street, Glasgow G2 5DT.

Federal German minister of transport visits UK

Kurt Gscheidle, Federal German Minister of Transport, paid a one day visit to London on 26 June at the invitation of William Rodgers, Secretary of State for Transport, for discussions on international rail freight between Britain and Germany.

UK allocated further £22.7m from ERDF

In the item on the European regional development fund (*Trade and Industry*, 16 June) the figures for total aid for the north west and Wales should have read £3,779,310.46 and £5,108,950 respectively.

New legislation

The legislation listed below has been published in the *Official Journal of the European Communities* as indicated against each item. The *Official Journal* is published in English and copies should be obtained from HMSO. Information about the items listed, in so far as other member states' requirements are concerned, is available to British exporters from Department of Trade, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757 ext. 7174/482/408.

Common agricultural policy

The texts of the following regulations which affect the various agricultural sectors in the EEC have been published in the *Official Journal of the European Communities.*

Oils, fats and oilseeds. The *Official Journal* L160, 17 June 1978 contains the texts of the following:

Regulation (EEC) 1291/78 fixing the target prices and basic intervention prices for oil seed for the 1978/79 marketing year.

Regulation (EEC) 1292/78 fixing the monthly increases in the target and intervention prices for oil seed for the 1978/79 marketing year.

Regulation (EEC) 1293/78 fixing the guide price for linseed for the 1978/79 marketing year.

Regulation (EEC) 1294/78 fixing the guide price for soya beans for the 1978/79 marketing year.

Regulation (EEC) 1295/78 fixing the amount of aid for cotton seed for the 1978/79 marketing year.

Regulation (EEC) 1296/78 fixing the guide price for castor seed for the 1978/79 marketing year.

Regulation (EEC) 1297/78 fixing the minimum price for castor seed for the 1978/79 marketing year.

Isoglucose. Regulation (EEC) 1298/78 amending articles 8 and 9 of regulation (EEC) 1111/77 laying down common provisions for isoglucose (*Official Journal* L160, 17 June 1978).

Wine. Regulation (EEC) 1299/78 fixing the guide prices for wine for the period 16 December 1978 to 15 December 1979 (*Official Journal* L160, 17 June 1978).

Seeds. Regulation (EEC) 1346/78 amending article 3 of regulation (EEC) 2358/71 on the common organisation of the market in seeds (*Official Journal* L165, 22 June 1978).

Regulation (EEC) 1347/78 fixing the amounts of aid granted for seeds for the 1978/79 and 1979/80 marketing years (*Official Journal* L165, 22 June 1978).

Tobacco. Regulation (EEC) 1348/78 fixing the norm and intervention prices and the premiums granted to purchasers of leaf tobacco and the derived intervention prices for baled tobacco for the 1978 harvest (*Official Journal* L165, 22 June 1978).

Imports from non-member states

The *Official Journal, L163, 20 June 1978, contains the texts of the following decisions:*

Decision 78/531/EEC authorising Ireland not to apply community treatment to outer garments and clothing accessories, other than blouses and shirt blouses, knitted or crocheted (not elastic or rubberised), or woven, for women, girls and infants, of wool, of cotton or of man-made textile fibres, falling within subheadings ex 60.05 A II or ex 61.02 B of the common customs tariff (Nimexe codes 60.05-22, 23, 24, 25 – 61.02-78, 82, 84) originating in India and in free circulation in the other member states.

Decision 78/532/EEC authorising Ireland not to apply community treatment to shirts, T-shirts, lightweight fine knit roll, polo or turtle necked jumpers and pullovers, undervests and the like, knitted or crocheted, not elastic or rubberised, other than babies' garments, of cotton or synthetic textile fibres; T-shirts and lightweight fine knit roll, polo or turtle necked jumpers and pullovers of regenerated textile fibres, falling within heading ex 60.04 (Nimexe codes 60.04-01, 05, 13, 18, 28, 29, 30, 41, 50, 58) of the common customs tariff, originating in Hong Kong and in free circulation in the other member states.

Decision 78/533/EEC authorising Belgium, Luxembourg and the Netherlands not to apply community treatment to men's and boys' shirts, woven, of wool, of cotton or of man-made textile fibres, falling within heading ex 61.03 (Nimexe codes 61.03-11, 15, 19) of the common customs tariff, originating in Hong Kong and in free circulation in the other member states.

Decision 78/534/EEC authorising Belgium, Luxembourg and the Netherlands not to apply community treatment to blouses and shirt blouses, knitted, crocheted (not elastic or rubberised), or woven, for women, girls and infants, of wool, of cotton or of man-made textile fibres, falling within subheadings ex 60.05 A II or ex 61.02 B (Nimexe codes 60.05-22, 23, 24, 25 – 61.02-78, 82, 84) of the common customs tariff originating in Bulgaria and in free circulation in the other member states.

Decision 78/535/EEC authorising Italy not to apply community treatment to orange juice, falling within subheading ex 20.07 B II of the common customs tariff, originating in Brazil and in free circulation in the other member states.

Decision 78/536/EEC authorising France not to apply community treatment to certain setts, flags and paving, hearth and wall tiles, falling within subheadings 69.07 ex A and B ex II and 69.08 ex A and B ex II of the common customs tariff, originating in South Korea and in free circulation in the other member states.

Decision 78/537/EEC authorising France not to apply community treatment to women's, girls' and infants' outer garments; blouses and shirt blouses, knitted or crocheted (not elastic or rubberised), or woven, for women, girls and infants, of wool, of cotton or of man-made textile fibres, falling within subheadings ex 60.05 A II or ex 61.02 B (Nimexe codes 60.05-22, 23, 24, 25 – 61.02-78, 82, 84) of the common custom tariff originating in Thailand and in free circulation in the other member states.

Decision 78/530/EEC authorising Ireland not to apply community treatment to jerseys, pullovers, slip-overs, twinsets, cardigans, bed-jackets and jumpers, knitted or crocheted, not elastic or rubberised, of wool, of cotton or of man-made textile fibres, falling within subheading ex 60.05 A (Nimexe codes 60.05-01, 27, 28, 29, 30, 33, 36, 37, 38) of the common customs tariff, originating in Hong Kong and in free circulation in the other member states.

Harmonisation of legislation

Materials for use with foodstuffs. The *Official Journal of the European Communities*, L163, 20 June 1978 contains the following corrigenda to directive 78/142/EEC on the approximation of the laws of the member states relating to materials and articles which contain vinyl chloride monomer and are intended to come into contact with foodstuffs, and directive 78/144/EEC amending for the sixth time council directive of 23 October 1962 on the approximation of the laws of the member states concerning the colouring matters authorised for use in foodstuffs intended for human consumption, the texts of which were published in *Official Journal*, L44, 15 February 1978.

Directive 78/142/EEC
Page 15, last recital, sixth and seventh lines:
for: '. . . in accordance with the opinions provided for . . .' *read:* '. . . in accordance with the options provided for . . .'
Directive 78/144/EEC
Page 20, fourth recital, fifth line:
for: '. . . the use of foodstuffs of certain colouring . . .' *read:* '. . . the use in foodstuffs of certain colouring . . .'

New EEC documents

This list of EEC documents was deposited in the House of Commons in the seven days to 29 June 1978 (Commission reference numbers, where appropriate, are given in parentheses). The documents are available for consulation at the Commission of the European Communities Information Office at 20 Kensington Palace Gardens, London W8 4QQ.

EEC draft documents

R/1292/78 COM(78)181 FINAL
Communication from the Commission to the Council concerning the transfer to the ECSC of customs duties on ECSC products; Draft decision by thie representatives of the Governments of the Member States of the ECSC, meeting within the Council, allocating additional revenue to that Community.

R/1484/78 COM(78)272 FINAL
Draft Commission Decision establishing a system of security in cases of the provisional establishment of an infringement of Commission Decisions fixing minimum prices for certain steel products.

R/1554/78 COM(78)239 FINAL
Draft Council Decision approving the conclusion by the Commission of an Agreement between the European Atomic Energy Community and Switzerland in the field of controlled thermonuclear fusion and plasma physics.

R/1577/78 COM(78)239 FINAL
Preliminary draft general budget of the European Communities drawn up by the Commission for the financial year 1979.

R/1596/78COM(78)239 FINAL
Amended proposal for a Council Regulation defining for 1978 measures for conservation and management of fishery resources by the establishment of quotas.

R/1597/78 COM(78)239 FINAL
Proposal for a Council Regulation (EEC) laying down for 1978 measures for the conservation and management of fishery resources including the establishment of catch quotas for herring stocks.

R/1607/78COM(78)239 FINAL
Proposal for a Council Regulation (EURATOM, ECSC, EEC) amending the Financial Regulation of 21 December 1977 applicable to the general budget of the European Communities.
S/1100/78 COM(78)239 FINAL
Recommendations for Council Regulations on the conclusion of Agreements extending the Interim Agreements with the Maghreb and Mashreq countries.

Consultative document
R/1424/78 COM(78)256 FINAL
Second list of requests for the carryover of appropriations between financial years 1977 and 1978.

Anti-dumping duties imposed on ferro-chromium from South Africa and Sweden

A provisional anti-dumping duty has been imposed by the EEC commission on imports into the EEC of ferro-chromium originating in the Republic of South Africa and Sweden. This duty does not however apply to ferro-chromium manufactured by Ferrolegeringar Trollhatteverken AB, Sweden.

The amount of such duty is variable and is designed to correspond to the difference between the fair market price in the Republic of South Africa and Sweden, as laid down in Regulation (EEC) Commission No. 1355/78 of 20 June 1978, and the cif community frontier price, duty unpaid.

In addition, the fair market prices are net if conditions of sale provide for payment within 30 days from end of month of delivery, they are to be increased or reduced by 1 per cent for any payment terms granting one month more or less.

The products subject to the new duty fall under heading 73.02 EI of the CCT and the fair market prices are given below.

Composition	Fair market price in US cents per lb of chrome contained	
	South Africa	Sweden
Ferro-chromium known as 'charge chrome':		
chrome content: 50-58% inclusive		
carbon content: 6-9% inclusive		
silicon content: 1-7% inclusive	34.35	36.05
High carbon ferro-chromium		
chrome content: greater than 58%		
carbon content: 4-7% inclusive		
silicon content: 1.5% maximum	37.13	38.93
Low carbon ferro-chromium:		
maximum carbon content: 0.5%		
maximum silicon content: 1.5%	59.35	62.23

The duties came into force as from 22 June 1978.

Suspension of anti-dumping duty

The EEC commission has suspended the definitive anti-dumping duty on imports into the EEC of certain sheets and plates of iron or steel originating in Romania. The full description of the goods is:

73.13 BIa – Sheets and plates, of iron or steel, other than electrical sheets and plates, not further worked than hot-rolled, of a thickness of 2 mm or more (ECSC).

Tariff quotas 1978 – exhaustions

HM Customs have stated that the UK's share of the following EEC tariff quotas have been exhausted:

UK tariff heading	Description of goods	HM Customs serial no. (Part 11 of the UK Tariff)
38.08 A	Rosins	1502
ex 42.02 B	Travel goods of other material – hand-made	1561
73.02 D	Ferro-Silicon Manganese	4517

The UK's share of the following EEC tariff quota for imports from Spain has also been exhausted:

UK tariff heading	Description of goods	HM Customs serial no. (Part 11 of the UK Tariff)
ex 22.05 CI(a) II(a) III(a)2	Wine of fresh grapes in containers holding two litres or less	7025 (Spain)

The following UK tariff quota for imports of paper and board and printed products from individual Efta countries and Finland (see *Trade and Industry*, 16 December 1977) have also been exhausted:

UK tariff heading	Country of origin	HM Customs serial no. (Part 11 of the UK tariff)
ex 48.01 F	Finland	2257
48.15 B	Sweden	2834
49.03		
40.05 A		
49.07 A		
CII	Finland	3104
49.08		
49.09		
49.10		
49.11 B		

Inquiries about current tariff quota balances may be made to HM Customs and Excise, Central Tariff Quota Registration Unit, King's Beam House, Mark Lane, London EC3R 7HE, tel. 01-626 1515, ext. 2570.

GSP: restoration of normal duties

Trade and Industry of 2 June gave details of GSP tariff quotas exhausted and GSP ceilings reached up to 15 May. HM Customs have stated that the position on the restoration of normal duties at 14 June is as follows:

I Tariff quotas and special ceilings

Tariff heading/ Description of goods	Customs quota reference	Date UK quota share exhausted	Community butoir or where applicable UK maximum cumulative amount (ma.) reached: duty re-imposed
53.07 (S/C)	Yarn of combed sheep's	6127	—	2.6.78 South Korea
55.05	Cotton yarn not put up for retail sale:			
	Other:			
(S/C) BI	Measuring per single yarn 120 000 m or more per kg.	6208	—	25.5.78 India
BII	– More than 14 000 m but not more than 40 000 m	6224	22.5.78	23.3.78 Brazil
55.08 (S/C)	Terry towelling and similar terry fabrics of cotton	6267	25.5.78	
56.07	Woven fabrics of mmf (discontinuous or waste)			
(S/C) B	Of regenerated textile fibre	6372	20.5.78	10.2.78 South Korea
58.05 (S/C)	Narrow woven fabrics	6445	25.5.78	
60.02 (S/C)	Gloves, mittens and mitts knitted or crocheted, not elastic nor rubberised	6631	—	25.5.78 Pakistan 25.5.78 Philippines
64.02 A	Footwear with uppers of leather	4231	—	30.5.78 Yugoslavia
B	Other	4258	—	30.5.78 Hong Kong
69.08 (S/C)	Glazed setts	7181	—	30.5.78 Thailand
85.01 (S/C)	Electrical goods of the following descriptions, generators,			
AII	motors			
	Other:	4886	—	16.5.78 Yugoslavia

II Ceilings

Tariff heading/Description of goods		Date of restoration of duties	
		From all sources	From particular sources (inner ceilings)
27.10	Petroleum oils		
A	Light oils		
III	For other purposes	—	29.5.78 Iran
41.04 BII	Goat and kid skin leather. Other:	25.5.78 (Except Group C)	7.4.78 India
44.13	Wood (including blocks, strips and friezes) but not further manufactured	—	10.6.78 Brazil
50.09	Woven fabrics of silk, of noil or other waste silk	—	29.5.78 Brazil
55.06	Cotton yarn, put up for retail sale	—	25.5.78 Argentina 25.5.78 Brazil
56.03	Waste (including yarn waste . . .) of mmf (. . .) not carded, combed or otherwise prepared for spinning	—	20.5.78 Yugoslavia
59.05	Nets and netting made of twine	20.5.78	10.3.78 Philippines 20.3.78 South Korea
74.04	Wrought plates, sheets and strips of copper	—	29.5.78 Yugoslavia
85.04 A	Electric accumulators	—	29.5.78 Yugoslavia
85.15 AI	Radiotelegraphic and radio remote control apparatus		
II			
IV			
B			
CI			
CII		—	29.5.78 India

Overseas trade news

Damaging blow if MTNs fail – Dell

It would be a damaging blow to the world trading system if the present multilateral trade negotiations failed to come to a successful conclusion on 15 July.

Making this point in a debate on trade and the national prosperity in parliament on 26 June, Edmund Dell, Secretary of State for Trade, said all those who were taking part in the negotiations accepted that it was of vital necessity that they should be successful not primarily for economic reasons but for political reasons.

Discussing the present situation in the MTNs, Mr Dell said, that these had taken place largely between the United States, the EEC and Japan but it was likely that all countries would soon be clamouring to join. The arrangements could not be finalised without the participation of other countries.

Mr Dell pointed out that the United States already had a large surplus of about $6 billion in 1977 with the EEC and it could not hope that the community should accept an even larger deficit to help the United States pay for its oil imports. 'I hope this will be in the minds of the American negotiators when they discuss the various difficult issues still to be settled within the multilateral trade negotiations,' he said.

On agriculture, Mr Dell said that the UK wished to provide better access for external suppliers of agricultural produce into the European market. If that could be achieved then the UK would also be able to help Australia and New Zealand to obtain better access to the community. 'I hope this will be tackled successfully through the International Wheat Agreement and I hope that we, for our part, will achieve – notably for the benefit of our Scottish whisky producers – the wine-gallon assessment system,' Mr Dell said.

There was no problem for the UK over relations with external suppliers of agricultural goods and he believed that all this could be done without undermining the common agricultural policy.

On tariffs, Mr Dell said that the position was still unsatisfactory. In the MTNs, he said that the UK was aiming to achieve not just a reduction in tariffs but a harmonisation in tariffs. Reductions would be phased over eight years with a break clause after five years.

Mr Dell explained that the characteristic of the United States' tariff had been that it had a series of high peaks. 'We thought, correctly I believe, that only by harmonisation would real reciprocal benefit be achieved. I cannot say that the United States' offer represents a satisfactory offer.'

Referring to woollen textiles, Mr Dell said that the United States' offer was altogether insignificant and came nowhere near meeting the requirements.

Mr Dell emphasised that the UK was trying to make the negotiations a success, but rules provided in the negotiations for the further development of international trade, would not be enough. If the open trading systems was to survive without crumbling further, a number of things were needed: a faster economic growth, a better balance in trading relationships, and an understanding of each other's trading problems and a willingness to discuss and to negotiate about them. 'The negotiations are to reconcile national interests in as peaceful a way as possible, without trade war and with mutual advantage. If we can achieve that objective, I think we can preserve the open trading system from further serious crumbling. That, at any rate, is the objective to which the British government is dedicated,' he concluded.

EEC foreign ministers agreed a community mandate for the final MTN negotiations. Mr Dell's reactions are on page 24.

Rodgers gives go ahead for Dover's new super berths

Secretary of State for Transport William Rodgers has given approval to the Dover Harbour Board's £9 million scheme for the construction of two new super berths at the port's eastern docks.

Work on the project, which includes additional land reclamation and the provision of improved facilities for foot passengers, is scheduled to start in September for completion by the spring of 1980.

Under section 9 of the Harbours Act 1964, government consent is required for any port development exceeding £1 million, but all capital investment by the board is financed by its operating revenue. In view of the extensive work in progress, recently completed or authorised, the harbour board's statutory borrowing powers have been increased from approximately £10 million to £30 million.

To finance the new berth construction and related works, Dover Harbour Board will be taking up a bank facility for a further £10 million before 1980 to be repaid 1982-85.

In addition to the new berths, the Dover Harbour Board is already proceeding with a 4 hectare reclamation scheme to provide additional space for freight assembly and the modernisation and enlargement of the eastern docks terminal reception facilities with additional agents offices and a new terminal control centre at a total cost of approximately £4 million. Work was completed late last year on the pad and apron for the new international hoverport at Dover's western docks, representing an investment by the board of £3.5 million.

BOTB chief sees plenty of export opportunities

Despite the sluggishness of world trade, there are still plenty of opportunities overseas. This was the view of Jim Wilks, chief executive of the British Overseas Trade Board, put forward at the Surrey and Hants Export Association dinner held at the University of Surrey on 29 June.

Illustrating the present scope in overseas markets, Mr Wilks said that western Europe still had to be one of the UK's best export markets for all types of manufactures, and the United States still remained Britain's largest trading partner. 'In both Europe and north America we did well in 1977 and I expect us to do well again in 1978. In addition, our Middle East markets and the oil producing countries continue to expand.'

Mr Wilks referred to his recent visits to the Far East where he found that countries like Hong Kong, Singapore, Malaysia and South Korea want British goods. These countries wanted to do more business with the UK, Mr Wilks said, and emphasising the openings for British technology in the Far East, he added: 'I don't necessarily mean high technology but what I might call appropriate technology. In Malaysia for example, they want sound, unsophisticated agricultural machinery.'

Mr Wilks stressed the many different types of support which were available to smaller exporters through the British Overseas Trade Board. He particularly highlighted financial help to trade missions, the discount given to firms taking part for the first or second time in a trade fair overseas and the Market Entry Guarantee Scheme – which is aimed at the smaller exporter and under which the board shares the risk of loss of going into a new market venture.

Hints to business men booklets

Revised editions of the booklets on Burma, Netherlands, and Nicaragua have been published in the *Hints to business men* series. British business men who intend visiting these countries on export business can order these booklets at £1 per copy (+ 20p if by post) from Department of Trade, Publications Sales Unit, Export House, 50 Ludgate Hill, London EC4M 7HU, or by calling at any regional office.

Advertisements are accepted for all booklets in the series which covers over 100 countries. Inquiries about advertising should be addressed to Cheiron Press Ltd, 8/10 Parkway, London NW1 7AD, tel. 01-267 1285.

Hints to business men booklets on Israel issued

A revised edition of the booklet on Israel has been published in the *Hints to business men* series. British business men who intend visiting this country on export business can order these booklets at £1 per copy (+ 20p if by post) from Department of Trade, Publications Sales Unit, Export House, 50 Ludgate Hill, London EC4M 7HU, or by calling at any regional office.

Advertisements are accepted for all booklets in the series which covers over 100 countries. Inquiries about advertising should be addressed to Cheiron Press Ltd, 8/10 Parkway, London NW1 7AD, tel. 01-267 1285.

New road transport agreement with GDR

As from 1 July UK hauliers no longer require road haulage permits for journeys to, or in transit through, the German Democratic Republic the Department of Transport announced on 23 June.

Article 10(2) of the UK-GDR road transport agreement (Cmnd 6568) provides for reciprocal exemption from permit requirements and this has now been agreed by the competent authorities of both countries.

Disclosure of import information

Under the provisions of section 3 of the Finance Act 1967 consideration is being given to the disclosure of import information relating to the last quarter of 1977 in respect of the following goods:

SITC(R)	Description	Tariff/trade code number
729.3	Other electronic micro circuits	8521 6829

The government is consulting the Association of British Chambers of Commerce, 6-14 Dean Farrar Street, London SW1H 0DX on these proposals and the association will take into account any views received from importers by 28 July 1978.

Inquiries may be addressed to Economics and Statistics Division 5, Branch B2, Department of Industry, 1 Victoria Street, London SW1H 0ET, tel. 01-215 5770.

Amendment to NTI 1685

The quota level for imports from Czechoslovakia, category 8, which was previously omitted, is £154,500.

Refunds of French VAT to UK traders

France's Ministry of Finance has been receiving inquiries from British business men about the refund of French VAT. The ministry has supplied the following information about value added tax which may clarify the position of traders doing business in France.

Traders making taxable supplies in France must declare themselves to the tax authorities within 15 days of beginning trading. If a trader has no branch in France, an agent – approved by the tax authorities – may carry out the formalities and pay tax on his behalf.

VAT incurred by such traders in connection with their business activities may be deducted as input tax from any tax payment due to the French authorities. It should be noted that certain VAT charges such as those on transport, board and lodging for staff and the purchase of fuel are not deductible in France.

Traders who do not carry out any taxable transactions in France but whose products are marketed there may reclaim VAT invoiced to them for the rental of stands at exhibitions, fairs etc, and the distribution of advertising material which relates directly to their products marketed in France. VAT on certain commission charges relating to the delivery of goods after customs clearance may also be refunded. Claims for refunds, limited to the services specified, can only be made through a representative in France who must be registered there for VAT or company tax.

Traders seeking further information on VAT refunds should consult a tax representative of their choice in France.

These arrangements are expected to remain in force until a VAT repayment scheme applicable to all member states of the EEC is agreed in Brussels.

London chamber runs language courses

A series of language courses is being run by the London Chamber of Commerce and Industry: 5 to 11 August, 14 to 20 October, 2 to 8 December, Arabic; 12 to 18 August, German; 4 to 10 November, French; and 18 to 24 November, Spanish.

The courses, run by staff of Professor Boland, consultant in instructional technology to Insead (European Institute of Business Administration, Fontainebleau, Paris, France), are not available to the general public but only to company executives and staff who are highly motivated to learn a new language within a period of six days in a group environment.

The courses are completely residential and the cost for each course per person is £398 which includes the course, materials, accommodation at Europa Lodge Hotel, North Stifford, near Grays, Essex, and half board.

Further details can be obtained from Miss B. Hallamore, London Chamber of Commerce and Industry, 69 Cannon Street, London EC4N 5AB, tel. 01-248 4444, ext. 34.

Ghana to repay £7.6m short-term debt

As part of an arrangement under which the government of Ghana has undertaken to repay outstanding short-term debts of £7.6 million, the Export Credits Guarantee Department has agreed to guarantee a £10 million line of credit which Standard Chartered Merchant Bank has made available to the Bank of Ghana.

Because of the Ghanaian debt problem, ECGD cover for exports to this market has been on a limited basis for a number of years. It is hoped that following this agreement the remaining balance of short-term debt will be paid with a minimum of delay thus permitting more normal credit relationships to be re-established.

The loan will finance contracts awarded by Ghananian buyers to UK exporters for the supply of a wide variety of goods including raw materials, consumer goods and engineering products. It has been arranged to help Ghana meet its immediate need for raw materials and other goods.

BOTB supporting 1000 UK firms this quarter

Over 1000 British firms, supported by the British Overseas Trade Board, will exhibit at 64 trade fairs in 24 countries during the three months of July to September.

In addition, over 850 companies will be assisted by BOTB to take part in 62 outward missions to 41 countries. The board will also support seven retail store promotions abroad.

Exhibitions being supported by BOTB range from hi-fi fairs in Tokyo at the British Export Marketing Centre in July and at Düsseldorf in August.

Engineering is the focus of two fairs in September. There is a British pavilion at the Sydney international fair and 65 firms will be showing their newest technical products and skills at Brno, Czechoslovakia.

Other fairs being supported by BOTB are Photokina in Brussels also in September, the Tehran international trade fair, Paris leather week and the oil and gas exploitation exhibition in Stavanger, Norway.

UK's first capital grant to Somalia

Britain is to provide a grant of £2 million to the government of Somalia to assist that country's development. This is the first capital aid provided by Britain to Somalia, and it will be tied to the purchase of British goods and services.

Some £600,000 of the grant will be used to buy prefabricated housing and furniture for the Juba sugar project.

The remaining £1.4 million will be used for the purchase of various goods required for Somalia's development, including cement, marine diesel engines and spares, equipment for small fisheries' workshops, tools and survey equipment, pesticides and fertiliser.

STRATEGY NEWS

Trade and Industry monthly guide to developments in the Industrial Strategy

No 1 July 1978

Not a political gimmick

Two and a half years after the launch of the Industrial Strategy, Secretary of State for Industry Eric Varley assesses progress to date and explains some of the current targets in this interview with 'Trade and Industry'.

Has the Industrial Strategy been more than an exhortation to industry to improve itself?
The Industrial Strategy is a national effort by government, management and workforces to improve the performance of our manufacturing industries. It is not a political gimmick nor an attempt by government, TUC and CBI to promote the 'corporate state'. It is vital that we regenerate UK industry. Our manufacturing industry was becoming steadily uncompetitive: between 1955 and 1975 our share of world trade fell from 20 per cent to 9 per cent. Last winter, the 40 or so tripartite sector working parties, which cover many of the key areas in manufacturing industry, set market-share objectives, which, if achieved, would add immensely to our balance of trade by 1981. The SWPs are now making the Industrial Strategy work. They are developing plans to tackle the important issues in their industries so as to make a reality of these targets. They have identified the problems and outlined the opportunities facing their own sectors. Their credibility within their industries has been growing fast.

Why has there been no reversal of the trend towards low performance, low productivity, low investment and low wages?
There cannot be an overnight transformation of our industrial performance. It will take a long time to reverse established trends. The Industrial Strategy was launched in November 1975 at a time when economies throughout the world were going into recession. Yet the SWPs have buckled down well to their tasks in the face of the difficulties. Effective action is now under way – for instance, in improving design, product development, and, above all, customer/supplier links. The domestic electrical appliances SWP, for example, is looking into the possibilities for joint marketing ventures. And the heating, ventilating and air-conditioning equipment SWP has produced a very useful guide to exporting to the Middle East. The increased capacity put in during recent years – often with help from my department's schemes of support – should be of great long-term benefit. Investment by private manufacturing industry has held up remarkably well in the face of the recession.

'A tremendous level of commitment'.

Surely Britain's industrial recovery depends to a large extent on an improvement in world trade?
Clearly a recovery in world trade is essential – and the UK is playing a major part in pressing for concerted action from all the important economies. What we must do through the Industrial Strategy is improve our competitiveness so that we do not lose out as the recovery from recession takes place. Effective action put in hand now should ensure that we can increase our share of home markets and overseas markets as trade expands.

The February National Economic Development Council meeting put great emphasis on action at plant level. Was the Industrial Strategy becoming bogged down in analysis?
Not at all. At its February meeting NEDC recognised that industry can become more competitive only by effective action at plant level. It has been crucial that each SWP first analyse its sector's problems; set ambitious but realistic targets; and examine the implications of these targets for the industry. In the majority of cases the SWP has gone a long way towards defining a medium-term strategy for its sector. We now want the management and workforces of all firms to consider how the SWP's objectives affect them and to determine what action they must take. We want industry to examine how it can improve the use of all its productive resources – materials, machinery, space, energy, manpower and so on – to make sectors more competitive internationally. This is why the main emphasis this year is on communicating the work down to plant level.

Are you pleased with the response from industry so far?
When the Industrial Strategy was launched there was, not surprisingly, some scepticism that this was just another talking-shop. I am glad to say that this attitude is now changing. There is a tremendous level of commitment by industry towards making a success of the Industrial Strategy. I have noticed this in recent visits to firms. My ministerial colleagues and I will be meeting and visiting many more industrialists this year to see how we can help put across the Industrial Strategy message.

Will the emphasis on company level action mean a withdrawal by government from the Industrial Strategy?
No – if anything quite the reverse. SWPs have made, and will continue to make, recommendations for government action. For our part, we will continue to respond to them imaginatively, as our record shows. For instance we introduced the market entry guarantee scheme and the product and process development scheme in response to points made by SWPs. And we are keeping under review our aid schemes to industry. We announced on 29 June that we had decided to extend the selective investment scheme to meet industry's needs. And we have announced a new scheme for energy conservation which fits in with our existing industrial schemes to help industry. I expect also that sponsor divisions within my department will be meeting more firms than ever before to ensure that the Industrial Strategy message is put across, to discuss the implications of sectoral objectives and the ways in which government might help industry achieve them. I should make it clear that the Industrial Strategy affects more than my department. The Department of Environment has been examining how to give more priority to industry through factory building, the housing of key workers, and encouraging the mobility of workers. The Department of Education is closely concerned in ensuring that more than ever our young people are equipped for industry and the education service is building a closer partnership with industry. And the Department of Employment is ensuring its manpower and training schemes play their part in providing the right skills.

SIS gets £25m boost

Secretary of State for Industry Eric Varley announced on 29 June that the selective investment scheme would be extended for another year to 30 June 1979. A further £25 million is being allocated to the scheme, bringing the total assistance available to £150 million. See page 4.

What the Industrial Strategy means

For over 20 years Britain's manufacturing industries have been losing ground to foreign competitors. It has happened not only in overseas markets but at home too. As a result, many of Britain's competitors have become more prosperous, enjoying a higher standard of living.

Launched at Chequers in November 1975, the Industrial Strategy sets out to make the UK a high output/high wage economy with an internationally competitive manufacturing base built on a substantial improvement in manufacturing performance. It involves identifying the reasons for Britain's comparatively poor performance in manufacturing; and finding ways to remedy the problems.

The job is being tackled jointly by government, management and unions under the umbrella of the National Economic Development Council (NEDC). And it is on a practical basis in that each of some 40 sectors of industry is being examined separately – by an economic development committee or working party of people directly involved in it.

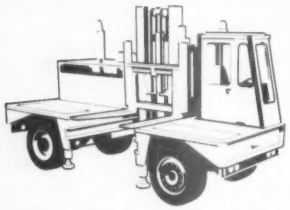
The task of each SWP is to study its particular industry in detail and to suggest ways of solving the problems facing its sector. The aim is to increase each industry's competitive performance so that it takes a larger share of home and overseas markets.

Sector in the spotlight

Industrial trucks

Every month we intend to publish a profile of one of Britain's key industries seen through the eyes of the sector working party studying its problems. We start with the industrial truck industry, which contributed some £230 million (at 1975 prices) to the UK balance of payments between 1970 and 1975, and which held its SWP conference in Birmingham last Saturday (1 July). This summary of the SWP's findings highlights the strengths and problems and suggests practical steps for building up a stronger, more internationally competitive industrial trucks industry.

The objective
Given that world markets are not growing as fast as they were in the 1960s and 1970s, and competition has got fiercer, the SWP's objective is a stretching target – to increase total sales in real terms by around 4.5 per cent per annum and exports by 7 per cent per



annum. But it points out that achieving this will call for a marked improvement in the industry's productive efficiency and marketing success.

Imports
Between 1970 and 1976, imports grew by 17 per cent per annum in real terms (from £16.1 million to £35.4 million), peaking in 1974 (see below) when the lack of component supplies and the disruption caused by the three-day week prevented the industry from meeting home demand. Share of home consumption accounted for by foreign trucks and spare parts needs to be contained, says the SWP.

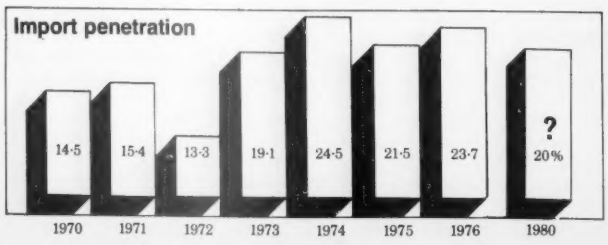
There are 60 or so companies in the worldwide industrial truck industry. Competition is faced from United States multinationals, EEC producers, Sweden and the eastern bloc (Bulgaria), along with Japan. The SWP explains that all these competitors are actively protecting their own home markets and are increasingly determined to expand their share of world exports. The major threats come from the United States, Japan and West Germany. In the UK, whilst British-owned companies hold the lion's share, import penetration has increased in recent years.

Production efficiency
Improved production efficiency is vital if the industry is to remain an important world supplier, says the SWP report. Increased rationalisation and reduction in the number and type of product 'families' and improved efficiency by suppliers will all play a part in achieving the sector's objectives – as well as plant and equipment renewal. Companies starting rationalisation schemes will need to complete them quickly to take advantage of all the opportunities available. Britain's competitors in general enjoy the benefits of higher productivity, good supplier interface situations and plant modernisation programmes. All these need to be matched in the UK to enable firms to compete successfully.

The SWP has made some international comparisons as part of its study of production methods. The studies have opened up possibilities for improving productivity, and companies are to hold discussions with their employees on the relevant issues, including the better utilisation of all human and financial resources.

Industrial trucks: main product sales

£ million	1970	1976
Forklift trucks	51.4	107.7
Pallet, platform and stillage trucks	2.8	4.6
Others (incl. side-loaders and straddle-carriers)	8.6	10.2
Industrial tractors		16.5
Parts and accessories	11.1	54.4
Total sales by companies with 25 or more employees	73.9	193.3
Allowance for other companies	4.1	13.7
Total industry sales		
At current prices	78.8	207.0
At 1975 prices	142.0	177.0



Supplier relations
In the case of suppliers, delivery on time and the closest partnership between manufacturers and suppliers is essential, says the report.

Buying department personnel from the SWP member companies are attending meetings with SWPs representing component suppliers, with the objective of improving inter-company relations and performance. Component supply has been identified as a potential major constraint in achieving sector objectives. Improved confidence in the flexibility and reliability of supply can greatly reduce the stockholding requirements, and hence improve the performance of companies in this sector.

Eliminating waste
The report points out that the principal element of cost reduction is in the purchasing of materials and components: direct labour accounts for 5 per cent of costs, overheads 30 per cent, and materials and components 65 per cent.

The report calls for action to eliminate waste, unnecessary breakdowns in industrial relations, bottle-necks in supply and outdated organisation and practice.

Avoiding manpower shortages
Some shortage of skilled manpower already exists, the SWP finds, among development and design engineers, design draughtsmen, machine-tool fitters, testers, planters, welders, and skilled maintenance fitters. To achieve its present objectives and stay ahead, the industry needs to retain its present workforce, attract the people it needs as production expands and develop the highest teamwork spirit.

Profitability
The industry needs internally generated funds both for expansion and to encourage the banks in turn to support companies' investment plans, says the SWP report. Average return on investment in the industry could inhibit financial support from the banks and other financial institutions. Strong international competition coupled with high domestic inflation and a rising sterling exchange rate threatens the industry's profit margins.

The cost of overseas marketing, including building up local distribution and the financing of adequate stocks, can be punitive for companies without a strong financial base. The report stresses that profitability and efficiency are essential for future progress.

Export markets
Companies need to exploit export opportunities all round the world, but resources are stretched too far and customers let down if priorities are not established.

The optimum course, says the report, is for maximum effort in today's best markets whilst the foundations are being laid in developing markets.

Restructuring successes

Restructuring of UK-owned industrial truck companies is seen as an urgent need by the SWP and some major manufacturers have already made moves in this direction, although not as a direct result of SWP action. Here we look at two case studies: the merger between the Henley Forklift Group and Lansing Bagnall; and the Coventry Climax takeover of Rubery Owen Conveyancer and Joshua Shaw.

Leading European exporter

When Lansing Bagnall and Henley Forklift Group joined forces within the Kaye Organisation in 1976, this privately owned group became the largest producer of industrial trucks in western Europe. With a current turnover in excess of £100 million, the group has a domestic market share of over 25 per cent and is the leading European exporter of forklift trucks.

Lancing Bagnall has six factories in and around Basingstoke which together employ some 3300 people. The Lansing Henley factory in Gwent, South Wales, employs 350.

For many years there had been much discussion about the need for rationalisation within the British fork-truck industry, and for greater concentration so that a British group would be more effective worldwide. The Lansing merger fitted in with Department of Industry policies and the Nedo industrial trucks sector working party report.

The merger has enabled the group to provide a very comprehensive range of fork trucks, has created increased production capacity and provided a broader marketing base. Lansing Bagnall

More information about the work of the industrial trucks sector working party is available from the National Economic Development Office, Millbank Tower, Millbank, London, SW1P 4QX, telephone. 01-211 6478.

manufactures over 70 different industrial truck models which offer a wide variety of alternatives to basic specifications. The product range falls into four groups: floor trucks, counterbalanced trucks, narrow aisle trucks, and special trucks.

Lansing Henley produces a range of 47 models including front-loader trucks, side-loaders and trucks for container handling. Capacities range from 2 000 kg to 40 000 kg – the largest being able to handle fully laden ISO freight containers.

With the merger, Lansing Bagnall embarked on a £6 million investment programme to improve and extend production facilities at its Basingstoke plant. The major part of this programme, a new factory for electronic component production, is nearing completion and should be occupied later this year.

In business for 30 years

Coventry Climax Ltd, the senior British manufacturer of fork-lift trucks, has been making these workhorses of industry since 1947.

Coventry Climax built three prototype forklift trucks in 1946, after observing the American approach to mechanical handling. A government defence department contract followed, with the first production of fork trucks, powered by Climax diesel engines, in 1947.

The company continued to manufacture engines, including the famous series of racing engines, but from 1947 the concentration of production centred on forklift trucks. Today the company is the second largest

manufacturer of this equipment in the UK.

Within the last two years the company has taken over Joshua Shaw and Sons Ltd, the Batley manufacturer of sideloaders, and, in 1977, it acquired the Conveyancer forklift truck business. This has meant a large expansion in manufacturing facilities and an even more extensive range of products.

Today, Coventry Climax, a subsidiary of SP Industries Ltd, employs some 3 000 people, most of whom are located at the factory sites of Coventry, Warrington and Batley, but many are in various sales and service depots throughout England and Wales. The considerable export business (some 30 per cent of total turnover) is handled through distributors in over 50 countries.

The company has been organised into five profit centres:

Climax International Sales, Climax Parts and Service, and manufacturing plants Climax Trucks – Coventry, Climax-Conveyancer and Climax-Shawloader.

The current range of Climax, Climax-Conveyancer and Climax-Shawloader trucks includes front and side-loading models of from 2 000 lb to 56 000 lb lifting capacity. Climax also markets certain models of the Steinbock range of trucks in the UK. A programme of rationalisation between the Climax and Conveyancer ranges is currently being undertaken and it is expected that a number of new models will be introduced shortly.

Extensive investment in new plant, manufacturing and office facilities is also under way with a view to increasing production and efficiency. This modernisation and expansion programme includes new manufacturing capacity at Warrington and Coventry and the provision of a new head-office facility in Coventry.

Industrial trucks SWP forward plans for 1978

Action plan 1. Determine key suppliers' capability and resources as part of improved interface. Examine the causes of poor performance by a few of the industry's suppliers in the light of their capability and resources.
Action plan 2. Determine action that can be taken to reduce imports both of finished trucks and components.
Action plan 3. Examine ways of increasing the industry's knowledge of its overseas market potential and the nature of problems that have to be solved to be increasingly successful in a wide variety of global markets.
Action plan 4. Develop a manpower plan for the industry covering the period to 1980–81.

SWP conference

Chaired by John Lyons (above), the industrial trucks SWP conference was held at the Metropole Hotel, National Exhibition Centre, Birmingham, on 1 July. On the agenda was a talk on the purpose and progress of the Industrial Strategy from Ian McDonald, Nedo assistant industrial director, and a review of progress on the SWP's recommendations from representatives of management, unions and government. More SWP conferences are planned for July (see page 4).

Vital role of research establishments

The Department of Industry has made a firm commitment to give priority to meeting the technology needs of manufacturing industry. This article by DoI's Industrial and Commercial Policy Division outlines the department's approach to the sector working parties' recommendations in this field and explains the role of the department's research establishments.

From the sector working party reports a clear pattern is emerging: the UK will in future, have to base its manufacturing industry on new and sophisticated products requiring advanced technology and having a high added-value content.

Inevitably, as developing countries industrialise they will move into the less sophisticated products and processes. At the same time, many of Britain's major competitors are now outstripping this country in their allocation of resources devoted to research and development for new products and processes. It is therefore crucial that Britain not only matches, but exceeds their efforts in the race towards developing scientific knowledge and translating it into the production of new goods and the development of new technology: otherwise the decline in UK manufacturing industry will continue.

The SWPs have acknowledged that there is a need for more investment, both of money and qualified people, in research and development. They are now making a major effort to ensure that action is being taken at plant level to meet this objective: and there are signs already that industry is responding.

Government help

In response to SWP recommendations, the government has introduced the £20 million product and process development scheme. In addition, the manufacturing advisory scheme has allocated £8 million to assisting smaller and medium-sized firms to make better use of proven technology and a number of sectors have already made extensive use of the scheme to improve their technology and efficiency.

DoI's research and development resources are directed by Dr Duncan Davies. In May, he took a symbolic step when he changed his title of Chief Scientist to that of Chief Scientist and Engineer. This change of title implied a new awareness by the Department of Industry that it had tended to play up the scientific role at the expense of the engineers (see *Trade and Industry*, 19 May, page 353). We are familiar with the accusation that Britain is strong in invention and innovation but poor in exploitation. The department is now committed to ensuring that its engineers are given full scope to apply their scientific colleagues' ideas in practice.

Industrial research establishments

The department is already looking closely at the utilisation of its 2 500 scientists and engineers to ensure that their work is more closely related to industrial needs. The proportion of work undertaken at the five industrially orientated research establishments, which is funded directly by industry on a contractor-customer basis, has risen from 9 per cent in 1975 to 13 per cent in 1977. The aim is to increase that proportion substantially.

An increase in this type of work is vital for two reasons. First, working directly with industry not only ensures that research establishments are doing work which directly benefits manufacturing industry, but brings them into direct partnership with their customers. An excellent example of this type of venture has been the work on the use of microprocessor control methods in sugar refining developed at Warren Springs under contract to the British Sugar Corporation.

The partnership between government and industry also provides the opportunity for valuable cross-fertilisation of

RE series

Articles covering in more depth the current work and services offered by the research establishments will be published in future issues of *Strategy news*.

ideas which can be of tremendous benefit. An example is the collaborative work of the Computer-Aided Design Centre with a British and Dutch firm to develop the pipework design management system to solve problems of plant layout and pipework design. To strengthen these links, the department has set up the Council of Research Establishments, which includes all the directors of the research establishments.

Research establishments also undertake work commissioned by the department. Major efforts are being made to ensure that this research is directed at industry's needs. It is often of a longer-term and slightly more speculative nature than directly funded research, mainly because the government is uniquely placed to carry out this type of work.

The nine requirements boards, which have a strong industrial representation, can direct work and ensure that such research programmes are attuned directly to the future needs of users. A number of sector working parties are currently discussing future work programmes with requirements boards. The department hopes eventually to develop this partnership further to bring about a useful exchange of ideas about future research priorities for strengthening manufacturing industry.

In this short article we have concentrated on one major function of research establishments, although of course they do provide a wide range of other vital services to industry on technology transfer, development of standards and the provision of technical advice, especially news of technological developments overseas.

The research establishments have a comprehensive range of skills and services to offer and industry is being urged to make the fullest use of them. On 22 June, Les Huckfield, Parliamentary Under-Secretary of State at the Department of Industry, launched a comprehensive review of their work (see *Trade and Industry*, 30 June, centre pages).

As part of its commitment to the Industrial Strategy, the department is making a major effort to help industry's future technology needs. It is now up to industry to respond by using the facilities available.

Warren Spring Laboratory wind tunnel modelling of pollutant distribution around proposed building complex.

Selective investment scheme extended

In view of its proved success, and its potential value as an instrument for the implementation for the Industrial Strategy, the government has decided that the selective investment scheme should remain open to applications for a further year. The budgetary allocation, which has already been increased by £25 million on 1 February this year, is now being increased by a further £25 million so that the total allocation stands at £150 million. Here we look at the impact of the scheme to date.

Introduced on 15 December 1976, the selective investment scheme is designed to promote investment projects normally costing over half a million pounds which would, through improved performance, yield significant benefits to the economy.

Industry has responded well to the scheme, and about 400 applications have been received. So far assistance of £37 million has been approved for 75 projects costing about £370 million. Over 180 further projects are under consideration.

Benefits so far

Projects approved so far give a useful, though necessarily incomplete, illustration of the impact of the scheme. They are spaced over many sectors, including chemicals, electrical and mechanical engineering, vehicles and components, metal goods and manufacturing, paper and board and textiles.

These projects will help to realise Industrial Strategy goals, such as the development of new products or removal of potential supply bottlenecks. Several of the projects will revitalise companies or divisions that would otherwise be run down.

The bulk of the investment is for expansion, and the export and import-saving effects should lead to a primary benefit to the balance of payments of over £200 million a year from 1982.

Although the scheme is operated on a national basis, two-thirds of the investment assisted so far will be in the special development areas or the development areas. The scheme has also attracted another 25 projects which have been found more suitable for consideration for regional selective assistance, and many of these are already going ahead in the assisted areas.

The approved projects should result in £250 million worth of orders being placed with the UK construction industry and plant and equipment manufacturers. These orders will bring the immediate benefit of some 35 000 man-years of work for those industries.

As the projects come on stream their direct effect will be to provide or safeguard over 10 000 jobs. Indirectly, they should safeguard tens of thousands of jobs through the widespread improvement in industrial performance.

Assistance negotiated

Assistance is negotiated in each case as the minimum necessary to bring about the economic and industrial benefits associated with the necessarily improved timing or scale of the project. So far about 60 projects have failed to meet the criteria of the scheme, and a further 75 have been withdrawn or transferred for consideration under other measures of support.

The level of assistance has varied generally between 5 per cent and 15 per cent of project costs (including working capital), but higher levels would be available for inducing particularly valuable projects. Appraisals suggest that perhaps a third of the projects might not have taken place at all without the scheme, or at least only on a much reduced scale or much later. The indications are that the other projects are being brought forward by different periods, averaging about two years. All projects are considered by the Industrial Development Advisory Board before they are approved.

Eventual impact

A further 183 projects costing £1,800 million are currently under consideration. Many of these are likely to be approved and the various benefits set out above could eventually be increased three or even four-fold.

Further information

More information about the selective investment scheme and other selective financial aid schemes is available from DoI's Industrial Development Unit, tel. 01-211 5030.

Diary of events: July

Over the coming months the government, management and unions will be making an increased effort to publicise the Industrial Strategy. Event arranged for July, some of which have already taken place, are as follows:

Date	Venue	Event
1 July	Birmingham	Industrial trucks SWP: conference
6 July	Edinburgh	Paper and board SWP: conference
6 July	Oxford	Speech by Parliamentary Under-Secretary of State for Industry Leslie Huckfield at Oxford Summer Business School on government and industrial relations
6 July	Bournemouth	Speech by Eric Varley to Society of Local Authority Chief Executives
13-14 July	Lancaster	Speech by Parliamentary Under-Secretary of State for Industry Bob Cryer on 14 July to trades union conference on Industrial Strategy
13 July	London	Industrial trucks SWP: export marketing conference

Many other events are being planned for future months, such as a series of regional conferences on the Industrial Strategy by the TUC, and information on these as well as other events will be carried in future editions of *Strategy News*.

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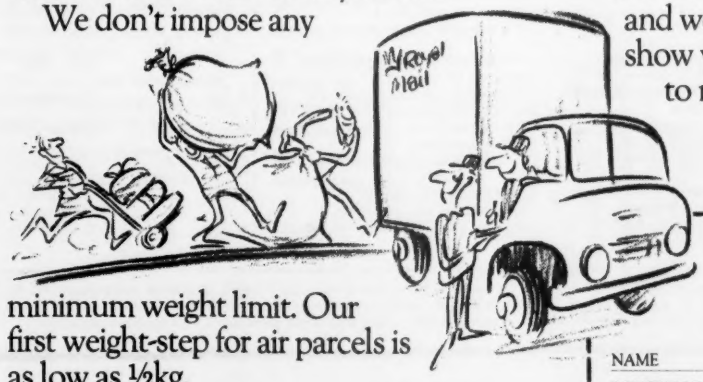

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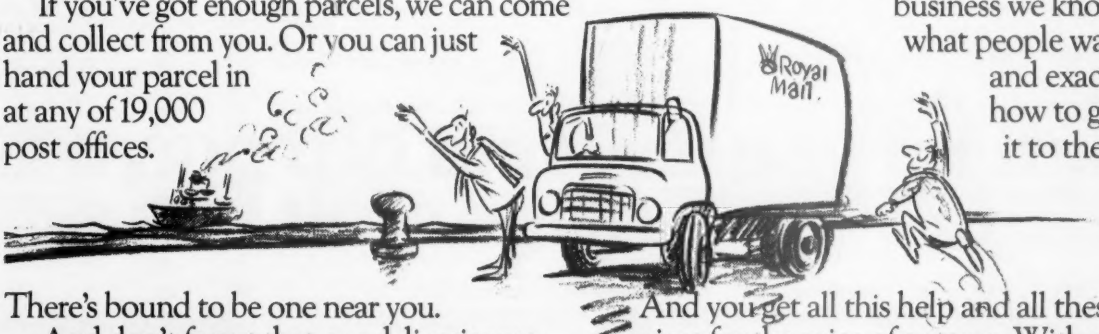

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ECGD general purpose lines of credit

The table below lists lines of credit guaranteed by the Export Credits Guarantee Department under which there is capacity for further export business to be financed as at June 1978

Departmental reference	Tel ext. at ECGD HQ	Recipient country	Borrower	UK bank	Purpose	Loan value £m	Minimum single contract value £'000s	Final date for entering into contracts
LC 499	598	Brazil	Banco Nacional do Desenvolvimento Economico	Lloyds Bank International	Capital and semi-capital goods and associated services and project business	20	100	November 1978
LC 773	7575	Bulgaria	Bulgarian Foreign Trade Bank	Lloyds Bank	UK plant, equipment and associated services	2	20	19 September 1978
LC 774	7575	Bulgaria	Bulgarian Foreign Trade Bank	National Westminster Bank	UK plant equipment and associated services	3	20	6 September 1978
LC 381	7575	Czechoslovakia	Ceskoslovenska Obchodni Banka AS	Lloyds Bank	UK capital goods and associated UK services	2	5	30 June 1978
LC 814	654	Egypt	Bank of Alexandria	Morgan Grenfell and Co Ltd	Capital and semi-capital UK goods and associated services	2	150	31 December 1978
LC 640	321	Guyana	Guyana National Co-operative Bank	Lloyds Bank	Capital plant, equipment and associated services	4.25	15	31 July 1978
LC 685	7575	Hungary	National Bank of Hungary	Morgan Grenfell and Co Ltd	Capital plant, equipment and associated services	5	5	15 July 1978
LC 809	7575	Hungary	National Bank of Hungary	Morgan Grenfell and Co Ltd	UK plant, equipment and associated services	3	10	16 September 1978
LC 835	7575	Hungary	National Bank of Hungary	Morgan Grenfell and Co Ltd	UK plant, equipment and associated services	5	15	21 June 1979
LC 762	351	Irish Republic	Electricity Supply Board	Hill Samuel and Co Ltd	Capital plant and equipment associated with the development of the electricity supply	3	30	3 November 1978
LC 416	607	Israel	The Maritime Bank of Israel Ltd	Manufacturers Hanover Export Finance Ltd	Capital plant and associated UK services	1	10	16 August 1978
LC734	607	Israel	United Mizrahi Bank Ltd	Manufacturers Hanover Export Finance Ltd	Capital plant, equipment and services	2	15	9 August 1978
LC 771	607	Israel	Bank Leumi le Israel BM	N. M. Rothschild and Sons Ltd	Capital plant and associated UK services	5	15	27 June 1978
LC 815	607	Israel	The First International Bank of Israel	N. M. Rothschild and Sons Ltd	UK capital goods and associated services	2	15	2 February 1979
LC 823	607	Israel	Industrial Development Bank of Israel Ltd	S. G. Warburg and Co Ltd	UK capital goods and associated UK services	3	15	31 March 1979
LC 687	529	Kenya	Industrial Development Bank Ltd	Morgan Grenfell and Co Ltd	Capital plant, equipment and associated services	2	125	30 June 1978 (6 months extension agreed)
LC 599	529	Kenya	Development Finance Co of Kenya Ltd	Manufacturers Hanover Export Finance Ltd	Capital plant, equipment and associated services	1	25	24 April 1978 (6 months extension agreed)
LC 760	7368	Korea South	Korea Exchange Bank	Lloyds Bank	Capital plant and associated services	10	20	31 December 1978
BC(MC) 37/99029	595	Mexico	Petroleos Mexicanos	Baring Bros Ltd	Capital plant and services (for Pemex only)	20	10	1 August 1978 (Polyethylene plant contracts)
LC 700	7574	Poland	Bank Handlowy	Lloyds Bank	Semi-finished and finished UK steel	30 *	240 *	2 March 1979
LC 745	7574	Poland	Bank Handlowy	National Westminster Bank	UK capital plant and associated UK services	5	25	9 November 1978
LC 768	7574	Poland	Bank Handlowy	Barclays Bank International	UK capital plant and associated UK services	5	20	10 November 1978
LC 807	7574	Poland	Bank Handlowy	Morgan Grenfell and Co Ltd	UK capital plant and associated UK services	5	20	21 October 1978
LC 846	7574	Poland	Bank Handlowy	Morgan Grenfell and Co Ltd	UK produced barley	30 *	250 *	31 August 1978
LC 808	7574	Poland	Bank Handlowy	Lloyds Bank	UK capital plant and associated UK services (for metal export only)	2	20	25 October 1978
LC 836	7574	Poland	Bank Handlowy	National Westminster Bank	UK artificial fibres and chemicals	30 *	120 *	10 April 1979
LC(FC) 801	607	Portugal	Sociedade Financeira Portuguesa EP	N. M. Rothschild and Sons Ltd	UK capital plant and equipment and associated UK services	8 *	35 *	21 December 1978
LC 757	642	Qatar	Qatar Fertilizer Co (SAC)	Hambros Bank Ltd	Capital plant and services for ammonia and urea plants	4.4	30	17 November 1978
LC 505	7575	Romania	Romanian Bank for Foreign Trade	Lloyds Bank	UK capital plant and associated services	2	5	30 June 1978
LC 763	7575	Romania	Romanian Bank for Foreign Trade	Barclays Bank International Ltd	UK capital plant and equipment and associated UK services	5	20	3 May 1979
LC 764	7575	Romania	Romanian Bank for Foreign Trade	National Westminster Bank	UK capital plant and equipment and associated UK services	5	20	23 February 1979
LC 777	7575	Romania	Romanian Bank for Foreign Trade	Barclays Bank International	UK capital plant and equipment and associated services	10	20	8 January 1979
LC 824	7575	Romania	Romanian Bank for Foreign Trade	Lloyds Bank	UK capital plant and associated services	5	20	11 December 1978
LC 710	351	Spain	Banco Hispano Americano	Midland Bank	Capital plant and equipment	1	30	1 September 1978
LC 718	351	Spain	Banca Catalana SA	Midland Bank	UK capital plant and equipment	1	30	30 September 1978
LC 746	7575	Yugoslavia	Yugoslav Investment Bank	Barclays Bank International	Capital plant and associated UK services	10	20	30 September 1978

* Dollar figures. 1 Requests for further information on any of these lines of credit should be made to the bank concerned or to Export Credits Guarantee Department, PO Box 272, Aldermanbury, London EC2P 2EL, tel. 01-606 6699, extensions as listed in the second column. 2 Exporters when negotiating business which might be financed under one of the above lines of credit should ensure that their contract price contains sufficient margin to cover the cost of any premium payable. These details can be obtained from the bank concerned.

Economic Trends

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New head for Caribbean development division

Mr J. C. Edwards, an assistant secretary at the Ministry of Overseas Development, is to become head of the British Development Division in the Caribbean in succession to Sir Bruce Greatbatch.

He is due to take up his new appointment at the beginning of August.

The British Development Division in the Caribbean is based at Bridgetown, Barbados. It is one of five regional development divisions run by the Ministry of Overseas Development in different parts of the world.

It advises British embassies and high commissions in its area, and the ODM itself, on local development needs and organises technical co-operation in the region.

In addition, the division administers ODM's aid programme to the associated states and dependencies in the eastern Caribbean area.

British aid for Guinea-Bissau

Britain is providing Guinea-Bissau with a grant of nearly £1.3 million from aid funds towards the cost of a Hawker Siddeley HS 748 passenger/freight aircraft and spares. The aircraft is intended to help improve internal communications.

Delivery of the HS 748, is due in mid-summer.

Internal communications and transport in Guinea-Bissau are poor and dependent mainly on water transport and, until recently, two old Dakota aircraft, both of which are now out of service.

West India committee sponsors scatter mission

A scatter mission to the Caribbean is being mounted by the West India Committee. The mission starts in Suriname on 21 October from where the mission can scatter.

Further information can be obtained from Tania Cox, Executive Trade Secretary on 01-629 6353.

Egyptian technical school to receive further UK aid

A grant of £1.02 million is being made by the UK from technical co-operation funds for further aid to Moharrem Bey Technical Training School, Alexandria, Egypt.

Britain has already contributed £1.48 million, under the aid programme, to this successful project. The new grant, like the previous one, will be used to buy British technical workshop equipment and spares; train Egyptian staff in British colleges of technology; supply British specialists in technical training and English language teaching; and allow other British experts to make short-term visits to help with curricula, teaching methods and specialist subjects.

Notices to importers

Issued by the Department of Trade, Import Licensing Branch, Charles House, 375 Kensington High Street, London W14 8QH. Telephone inquiries should be addressed to the number at the end of the notice.

1687: Imports of bananas from the dollar area

To offset expected shortfalls in supplies of fresh bananas to the UK from other sources, a further supplementary quota of 6000 tonnes has been established for imports from the dollar area.

In order to ensure continuity of imports, the supplementary quota will be allocated between existing licence holders, having regard to the use they made of their allocations under the quotas for 1976-77.

Import licences will be issued to importers against their allocations only for those amounts for which they can produce evidence of a firm contract with the overseas supplier.

Licences issued under these arrangements will be valid for three months.

Inquiries: Import Licensing Branch, 01-603 4644, ext. 361.

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27.8.- 30.8.1978

Overseas trade exhibitions

UK firms confident of success in tough market

From T. D. Curran, British consulate-general, Edmonton

Twelve UK companies engaged in supplying products and services to the petroleum, gas and petrochemical industries exhibited at the biennial national petroleum show held in Calgary from 13 to 15 June. The British group, by far the largest integrated overseas contingent at the show, was participating in a joint venture sponsored by the British Overseas Trade Board and CBMPE.

Over 20 000 trade and technical visitors registered to view the exhibits of 525 companies on the two levels of the Big Four Building and outside on the Calgary Stampede grounds.

The show, which now claims to be the second largest of its kind in north America, attracted delegations from a number of energy-oriented countries including France, Venezuela and Mexico and served as focal point for a number of technical seminars, notably the twenty-ninth annual technical meeting of the petroleum society of the Canadian Institute of Mining and Metallurgy, which itself attracted 1000 technical visitors.

As always the national petroleum show offered an impressive display for the visitor and, with interest quickening in the $10 billion Alaska Highway gas pipeline project, the display organised by the Pipeline Contractors Association of Canada was of particular interest. This demonstrated equipment and techniques used in all stages of laying a section of 48 inch pipe.

Although the exhibits on the British booths were of a more conventional nature the integrated stand was conspicuous, with long Great Britain signs suspended above, and attracted much favourable comment for its professional appearance.

Almost all the UK firms were happy with their success at the show, the exposure given to themselves and their products and the knowledge they had gained of an exciting and important area in the world energy scene.

At least six of the British companies had exhibited at Calgary before and for them this was another opportunity to extend their range of contacts. R. A. Lister and Co and Petters Ltd, already well established in the market, both reported serious inquiries and important new contacts. Welding Units Ltd, exhibiting for the third time, again found a high level of interest in its products and is hoping to increase its share of the western Canadian market as a result of this show.

Truflo Ltd found considerable interest in a new valve actuator launched at Calgary and this company and three other firms reported serious interest from potential agents, distributors or joint-venture partners. Good local representation is essential if a UK firm is to build and maintain a position in this US-dominated industry.

GKN Birwelco, already well known in the western Canadian energy-processing industry, mounted a good visual display, and with Mackley Ace Ltd (whose working model of a hover transporter attracted many visitors) again found that the Calgary show enabled them to make important new contacts.

Robert Jenkins and Co Ltd reported considerable interest in its TIG tube-end welding machine.

The one or two companies who were new to the Alberta oil patch expressed surprise at the size and scale of some of the major projects now being considered.

All the British exhibitors left Calgary convinced that the potential of the area justified their presence and continued efforts to develop sales in a market which is tough but offers immense opportunities over the next couple of decades.

Quiet but useful contacts at Brussels fairs

From Michael Hewitt, British embassy, Brussels

There was a high proportion of first-time UK exhibitors at the fifth international industrial exhibition held at the Palais du Centenaire, Brussels, from 28 May to 1 June, under the theme 'Tomorrow's techniques for today's men'. Consequently there were also a large number of British products on show for the first time.

The UK's joint venture consisted of 12 companies sponsored by the Birmingham Chamber of Industry and Commerce and the British Overseas Trade Board. The group had a good central position in the main hall and also benefited from a cleverly designed open-frame stand which stood out prominently from its neighbours.

Heenan Drives reported an encouraging level of interest in its new variable-speed drive, the Motovator 132. W. J. Reynolds was happy with the inquiries and orders for their high-pressure cleaning machines. The high temperature fasteners and portable boring machines on Buma Engineering's stand attracted a satisfactory number of serious inquiries. Climax International Sales, already well established in the Belgian market and extremely active locally showed an impressive range of fork-lift trucks.

Sir David Muirhead, British ambassador to Belgium, at the Brussels industrial fair.

Most of the British participants were disappointed at the low number of visitors. Total attendance came to 25 000 which was down on previous years. There may be two reasons for this, first, it was hot and sunny during the exhibition after a long period of cold, grey weather and secondly, and more important, the economic outlook is still uncertain, and business confidence, so necessary for investment in new machinery and equipment, remains fragile. On the other hand, the quality of visitor was good and a surprisingly high number of Belgian companies made approaches to be agents.

The exhibition was quiet but even so the British group made useful contacts, started agency negotiations, and supported existing agents, all essential steps towards developing new markets and increasing market shares. The next exhibition will take place in May 1980.

UK cleans up at Frankfurt laundry fair

From Mike Hilton, British consulate-general, Frankfurt

A total of 226 firms from 14 countries took part in the sixth international laundry and dry cleaning exhibition (IWC) which took place from 4 to 11 June in Frankfurt. The 22 British exhibitors provided the second largest foreign contingent. Thirteen firms exhibited in a joint venture organised by the Society of Laundry Engineers and Allied Traders and the British Overseas Trade Board, and a further nine exhibited privately.

The majority of the 25 000 visitors to IWC were from the trade. An encouraging 82 per cent of visitors reported that they were attending the fair with the intention of placing orders. Sixty-eight per cent of the total visitors were made up from laundry and dry cleaning firms, 8 per cent represented important end-users

Japan looks to Britain for tasteful housewares

Japan's younger married couples are aspiring to a more western home lifestyle. In this expanding market, British goods of high quality, tasteful design and competitive pricing are attractive to the Japanese. Robin Lavery of the British embassy in Tokyo reports on the reactions to a recent housewares exhibition at the British Export Marketing Centre.

Exhibitors at the British housewares and gardening equipment exhibition held at the British Export Marketing Centre (BEMC) in Tokyo, from 6 to 10 June, confidently predicted business to the value of £800,000 over the next 12 months as a result of the promotion. A further £400,000 of orders are expected by some of the companies already firmly established in the Japanese market and not attributable to their attendance at this exhibition.

On the housewares side, it is less than a year since the first concerted effort by British manufacturers to penetrate the Japanese market took place (at the BEMC housewares show in July 1977) and these preliminary results must be seen as encouraging.

These preliminary results are such that they should encourage British manufacturers who have not yet tackled the market in Japan now to begin looking at it seriously.

While the Japanese lifestyle is already westernised to a degree, the 'average' Japanese home has been relatively untouched by western-style interior and garden equipment ideas. This situation is not going to radically alter overnight, but at the exhibition the signs were that as far as British manufacturers are concerned, the Japanese are at the beginning of an exciting period of change.

Consumers are conscious of 'home improvement and the new family' (that is the younger married couples) in Japan is now aspiring to a more western home lifestyle.

Although consumer demand has not come up to expectations in the early months of this year, inter-retail rivalry and sluggish consumer spending demand new ideas and new products. Skis and golf clubs may have peaked, but the market for household goods, provided they have been designed to the tastes and needs of the Japanese, may soon take off.

Not that the Japanese market can be tackled without dedication. Opened at a reception on 5 June by Sydney Giffard, Chargé d'Affaires, with Tanji Kosuge, President of the Japan department stores association, as guest of honour and David Foulds, managing director, William Mallinson and Sons, as British industry spokesman, the exhibition consisted of 16 companies who were for the most part experienced in Japan, 11 having exhibited previously at the BEMC. With the exception of three companies, all were represented in Japan before the exhibition and the majority were making their second visit to Tokyo within a year.

Education

Product education of the agent and his staff and market testing of new designs produced with the Japanese consumer in mind, played important role at the exhibition. The British reader might be bemused at seeing chopstick rests for the first time, and similarly the Japanese consumer may be a little lost when deliberating over a modern British chopping board. Indeed, it is not uncommon to find provincial Japanese hotels unequipped with eggcups: wine glasses or tea cups being brought into service for soft-boiled eggs.

David Foulds said that the exhibitors had been impressed with the quality of visitors and probably spoke for most of his colleagues when he commented that the exhibition had been a vital step in developing the market by the education of importers, wholesalers and retailers in product characteristics and uses.

Lance Weatherall of Helenware (like Mr Foulds not a newcomer to Japan) said that the reaction from the many buyers whom he saw completely confirmed his company's initial research, which showed that British goods of high quality, tasteful design and competitive pricing were extremely attractive to Japanese consumers.

Tremendous help

The exhibition had been of tremendous help to David Day of Huntley, Boorne and Stevens in cementing good relationships with Japanese companies and it had also given him a much better insight into the Japanese market. Mr Day added that he saw very good prospects for growth in the housewares market.

The exhibition was one of the most attractive held at the BEMC and although aimed at the trade, the enticing display windows brought a number of inquisitive members of the general public into the hall. Jack Baker of the British Hardware Manufacturers' Association, which sponsored the exhibition, himself an experienced organiser of trade shows, including the international spring fair in Birmingham, believed that the facilities at the BEMC and the presentation of the products were amongst the finest he had experienced.

From an overall point of view by the embassy's commercial department the interest shown by department and supermarket stores and several important wholesalers of related consumer products, who until recently have not been keen to diversify into new lines, suggests that the relatively unexploited housewares, interior decor and furnishings sector and gardening equipment and accessories market have a promising future in Japan.

(hotels, hospitals, etc), and 17 per cent were from the industry itself.

Both German and foreign exhibitors seized the opportunity to reveal technological advances in washing machines, dry cleaning machines, ironers, and feeding and folding equipment. There were indications of a trend towards more automation, and towards recognition of the need to save energy, to meet new safety regulations and to combat pollution.

British exhibitors were generally well satisfied with the level of interest and number of inquiries they received. The Saltney Engineering Co sold 3000 towel cabinets and took £50,000 worth of orders. BMM Weston found the response from both German and foreign visitors very encouraging and naturally attributed this as much to the latest version of its Tunnelmaster steam tunnels and W. Dupress twin table rotary presses as to Miss Great Britain and Miss B M M Weston who were on hand to help with the numerous inquiries.

Mr A. Roberts of Walk Off Mats, also spoke enthusiastically of the interest shown in his firm's products. Mr R. Jack of Spencer Jaxons considered he had had an outstanding fair and hoped soon to appoint agents in eight countries as a result of inquiries received.

With no disrespect to the nearby glamour, the most eye-catching stand was undoubtedly that of Thomas Broadbent. The company's self-loading and unloading auto-extractor and System Six attracted large crowds. The firm expected to appoint an agent for West Germany very soon.

Another exhibitor hoping to follow suit was John Gooden of Powles Hunt for whose firm the IWC, its first overseas fair, had been so encouraging that the firm fully intends to participate in future fairs.

Where there's muck there's brass confirmed at Ifat

From N. U. Rothnie, British consulate-general, Munich

Ifat 78, an acronym for the international trade exhibition for sewage engineering and municipal cleansing, took place in Munich from 5 to 10 June and now claims to be the largest event of its kind in the world. It certainly doubled in size since the last event in 1975 this being largely due to the German association of municipal cleaning authorities deciding some time ago to throw in its lot with Ifat and so create an event covering all aspects of the vital, if not very esoteric, subject of sewage and refuse engineering.

Twenty-eight British firms were amongst the 600 exhibitors and although some of these did not see as many of the claimed 27 000 visitors as they would have wished, a general consensus of opinion was that participation was useful and in many cases highly rewarding.

With the home market for sewage and refuse equipment presently repressed, British firms are increasingly turning to overseas markets to compensate. Although the adjustment can never be an easy one, the potential rewards are considerable given a medium to long-term approach.

Britain's engineering capability in the field of sewage and refuse engineering is held in high regard even if the international competition is considerable. There were plenty of signs at Ifat that British firms mean to have a share of the cake.

Ten companies exhibited on a joint-venture stand sponsored by Sira in conjunction with the British Overseas Trade Board and were

extremely pleased with the results obtained during the six-day event.

An interesting and positive aspect was that although interesting inquiries were received from Germany, a large proportion were from third countries with a relatively low level of infrastructure.

The Ifat claim to be international was therefore well substantiated as far as the British exhibitors were concerned. Products on the joint-venture stand ranged from sophisticated electronic measuring and analytical instruments to refuse compaction equipment and specialised filtration materials.

The busiest stand was probably that of the company Insituform which was showing its ingenious system for in-situ repair of damaged pipes. This company which supplies know-how and the pipe-lining material to licensees all over the world received over 600 inquiries during the exhibition and the potential of the system can be ascertained by the fact that in the UK alone an estimated 1000 miles of sewage piping will require replacing or strengthening in the immediate future.

Mr Chandler of the British company estimated that his German licensee was in a good position to obtain contracts over the next few months to the value of several million deutsche marks which was as good a way as any of convincing the German firm that they were on to a good thing.

Edbro (Bolton) Ltd which manufactures waste-compaction equipment and vehicles were at Ifat for the third time and expressed satisfaction at the many inquiries received for its products in particular from third countries and felt that previous participation at the exhibition was now beginning to pay dividends.

This view was confirmed by other companies who have exhibited regularly in the past – the argument being that a one-off participation at any trade fair was largely a waste of time and money unless it was patently clear that the products of a company did not fit into the general theme of such events.

Firms not prepared to integrate regular participation at chosen trade fairs into their overall marketing strategy were really wasting their time. This is a pity since the joint-venture support offers by the British Overseas Trade Board and industry was a very cost effective way, particularly for small and medium sized firms with limited funds, to introduce themselves to overseas markets. In other words persistence and the determination not to be put off by seeming indifference at one's first attempt are the precursors to success in any market place particularly overseas where a firm's domestic reputation means little or nothing.

All-in-all, British participation at Ifat produced a satisfying number of serious inquiries with the majority of exhibitors expressing the firm intention to be present at the next event in three years time.

Advertisements for 'Trade and Industry'

All advertisement inquiries and bookings should be addressed to the Advertisement Department at 13 Great James Street, London WC1, telephone 01-242 9478.

Overseas trade export services

Hull wins new Gulf service

Hull has been chosen as the British port from which a new export general cargo service will operate to the Gulf ports of Dubai, Bahrain, Kuwait, Khorramshah, Dammam and Bandar Abbas.

Starting on 27 July the service, operated by Scanmel (Scandinavian Middle East Line), which is extending its general service call pattern to include the UK will have a frequency of a sailing every month. First sailing from Hull will be by the MV *Torrens* owned by Wilh Wilhelmsen who jointly operate Scanmel with Broström Shipping Company of Gothenburg.

Further information: circle 718

Container investment at Preston

New container handling equipment and other facility improvements costing more than £125,000 are now in operation at the port of Preston's expanding container terminal.

The new investment covers marine-terminal tractors from Reliance Mercury, 40 ft platform semi-trailers from York Trailers, a heavy-duty fork lift truck from Hyster, and new semi-automatic spreaders from Stothert and Pitt for handling 20 ft and 40 ft containers.

Improvements to the existing 25-ton gantry crane and paved container-standing area, next to the container terminal berths, are also an important part of this investment.

Progressive development of the port of Preston's north side container terminal will provide capacity for handling 80 000 TEUs per year, with the total programme scheduled for completion in early-autumn 1978.

Further information: circle 719

New MacPak terminal in Bilbao

MacPak new container/ro-ro terminal in the port of Bilbao is now open for freight traffic. Involving a total area of nearly 25 000 m², and the terminal also includes a 5000 m² concessional area for marshalling containers, a TIR parking area and covered shed areas and consolidation deconsolidation compounds, workshop, offices etc.

The new terminal installation which involves a total investment by Mac Andrews of just over £2 million now provides Mac-Andrews with a base-port arrangement in northern Spain positioned for a streamlined through-cargo system, capable of reaching any inland destination in Spain within 48 hours of cargo being discharged in Bilbao. In conjunction with the Spanish rail authorities, MacPak claims the fastest and most economical express route between the UK and all the major industrial and commercial areas adjacent to Bilbao, Madrid, Barcelona and Valencia in Spain.

Further information: circle 720

Fixed price service to W. Germany

A guaranteed daily departure full load and groupage service with a fixed price between any point in the UK from Birmingham southwards to any point in West Germany within 100 km of Dortmund, has been introduced by Dover Continental Road Trains of Aylesham, Canterbury.

The new service which began on 26 June meets some of the principal recommendations of the recent report of the International Freight Movement EDC, 'Trading with Europe, Through Transport and the Total Export Concept'.

Dover Continental believe the service is the only one of its kind available to British exporters, and puts virtually anywhere in the Ruhrgebeit within a fixed price of the southern half of England.

The service will be operated by Dover Continental's own British driver-accompanied

Export services: now every week

Export services will now appear every week in the pages of *Trade and Industry*.

If your company has recently introduced a new service for exporters – in, for example, the packing, forwarding, shipping, airfreighting, banking or translation fields – we would be glad to have details, plus a good black and white photograph where appropriate.

Items for inclusion in this feature should be addressed to the Overseas Editor, Trade and Industry, Room 439, 1 Victoria Street, London SW1.

Advertisers who wish to be associated with this feature should contact Dudley Masters on 01-242-9478.

12-m trailer/tractor combinations, and the Kent-based company's fleet is being expanded to cater for the new traffic.

Further information: circle 721

Groupage container service to Ivory Coast

Wm. H. Muller is starting a less-than-container load container groupage service from its UK depots to Abidjan, Ivory Coast.

This service complements the full container load operation and provides shippers with LCL reception facilities at the Muller depots at London, Birmingham, Southampton, Liverpool and Glasgow, at very competitive rates.

The service began last Monday (26 June) and offers transit time from UK depot to delivered on quay Abidjan of about 15 days.

The fcl service continues to operate on a through basis from any point in the UK with the same fast transit times to the Ivory Coast.

Further information: circle 722

New Glasgow depot for groupage cargo to the east

Contship Gulf, has introduced a new groupage receiving facility in Glasgow, for the consolidation of 'less-than-container-load' (lcl) cargo from Scotland to Teheran, Beirut, Bombay and Casablanca.

Lcl container services to these cities are already operating from Felixtowe, Birmingham and Manchester depots.

The new terminal is at David W. Haig Ltd., Righead Industrial Estate, Bellshill, near Glasgow, with continuous receiving of cargo Monday to Friday between 08.30 – 16.30 hrs.

Containers are shipped on Contship's regular fortnightly services via Felixstowe to Iran, the Lebanon, India and Morocco.

Further information: circle 723

New warehouse at Ipswich . . .

A new warehousing complex has been opened at Parkside, Duke Street opposite Orwell quay docks of the port of Ipswich.

Designed to accommodate all types of goods, the complex comprises 37 000 ft² of covered storage space, with a further 50 000 ft² of 'open' parking space for lorries, trailers and containers.

A new Paul Magnus company, Paul Magnus Warehousing is the latest in a series of planned 'transportation' developments, and is completely tailored for all companies with exports or imports moving through the port of Ipswich to anywhere in the world or throughout the UK.

All types of goods will be handled, whether contained, baled in sacks, drums or bundles. Stock storage can be accommodated and Paul Magnus Warehousing state they will endeavour to handle, store and deliver anything, anywhere at any time during the day or night.

Further information: circle 724

. . . and at Whetstone

The new warehouse has been opened in the London suburb of Whetstone for Michael Gerson Ltd. Developed as a site of about 1 hectare it is being developed in two stages. Stage one, now completed, comprises a warehouse and office complex which occupies just over half the site area. Stage two of the development will consist of further warehousing.

The warehouse has been designed and built to meet Michael Gerson's needs. The eastern part of the warehouse will be used to store the company's own custom-made removals containers; this area has a capacity for 500 such containers, stacked three high (each container measures 8 ft by 6 ft 2 in by 8 ft 6 in and has a load capacity of 2 tons).

The central part of the warehouse will be used for goods in transit, for packing and unpacking containers and for loading/unloading vehicles and ISO containers which can be driven into the warehouse via the doors on the south side. There are five loading docks along the west side of the warehouse, each 30 ft wide and at tailboard height; three of these are serviced by dock-levellers to facilitate container loading and unloading.

The warehouse has been designed to handle containers of all kinds. It has a height of 30 ft to the eaves, and a floor loading of 1200 lb per ft².

To handle the company's storage containers and for general lifting, Michael Gerson operates three liquefied petroleum gas forklift trucks, and the company maintains a crane for lifting loaded 20 ft ISO containers. There is also a fleet of electric and hand operated pallet trucks.

Further information: circle 725

Literature on export services

Literature detailing export services available to British companies including the development of export procedures within companies and the execution of all work involved in freight and project forwarding is available from Furncliffe Export Services.

The company specialises in all administrative, organisational and physical aspects of exporting goods world-wide on behalf of British industry and will supplement a company's existing resources or undertake total responsibility.

Further information: circle 726

Danish line increases sailing frequency

DFDS, the Danish shipping line, is stepping up its sailing between north-east England and Denmark in the autumn when there will be four sailings a week in each direction, compared with two at the present time.

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

The introduction of a three-times-a week, year round passenger service from North Shields to Esbjerg, has enabled the freight sailings to be increased. The passenger service is being operated by the dual purpose MS *Winston Churchill* which has vehicle deck capacity for trucks, trailers and containers. The fourth sailing will be maintained by a freight-only ro-ro vessel.

The new frequency will provide shippers in the north east and north west of England and Scotland with an 18-20 hours crossing time to Denmark.

Further information: circle 727

OT increases load-carrying units

More than 300 flats and 'Stakrak' units have just been purchased by OT Express Line, for use on its ro-ro services from the UK Scandinavia and Continental Europe to the Middle East. The Red Sea and Gulf areas are served by direct calls at Jeddah, Dubai, Umm Said/Doha and Bandar Abbas, and a new service to Karachi started in June.

A further new ro-ro vessel, sister-ship of *Emirates Express* and providing 2-520 lane metres of cargo space (840 TEU), is scheduled to enter service with OT Express Line in the late summer.

Further information: circle 728

Barclays International opens in Zurich

Barclays Bank International's new Zurich branch opened on 26 June.

The new branch situated at Talacker 41, CH-8001 Zurich, will also provide a full range of banking services but it will be mainly concerned with corporate business, particularly in connection with international trade and wholesale banking services.

Further information: circle 729

BMT offer Leipzig fair package

Inclusive arrangements for visitors to the annual Leipzig autumn fair held from 3 to 10 September are being offered by Barry Martin Travel.

Rates for the three-day/two night package, on half board basis, start from £177 with twin room accommodation, or £193 single – additional nights from £18 and £26 respectively.

The BMT package includes on-site representation, fair card and visa service, airport to hotel transfers, and local self-drive car hire from £6.60 per day.

Further information: circle 730

Overseas trade country data

Australia

Industrial engines. The Australian government has received a request for temporary protection against the import of spark ignition industrial engines falling under tariff item 84.06.719 and 84.06.910.

Requests for temporary protection are initially considered by the department concerned and at a later date they may be referred to the Temporary Assistance Authority (TAA) for inquiry and report within 30 days of the date of reference. Any temporary protection that may be accorded goods of local manufacture on the recommendation of the TAA would be in the nature of a holding action pending government consideration of the long-term protection of the local industry.

Interested parties who wish to make their views known on this application for temporary assistance should send their comments to reach the Department of Industry and Commerce, Canberra, PO Box 80, ACT 2600 not later than 20 July.

Inquiries: CRE 01-215 5319.

Ref: CRE 1059/78

Asbestos. The Australian government has sent a reference to the Industries Assistance Commission on the question as to whether long-term assistance should be accorded the local asbestos industry and, pending receipt of its final report by the government, the commission has also been requested to report within 60 days on the short-term assistance needs of the industry.

UK firms and trade associations intending to submit evidence at the public hearing, details of which will be announced later, should advise the Industries Assistance Commission as soon as possible at PO Box 80, Canberra, ACT 2600. Evidence may be submitted through the accredited agent of the firm or trade association concerned, or through the Australian-British Trade Association, 6th Floor, Dorland House, 18–20 Lower Regent Street, London SW1Y 4PW, tel 01-930 2524, who will represent UK interests if authorised.

The association charges a fee for its services, the amount varying according to the work entailed in the preparation of a submission and whether or not the interested party is a member.

Inquiries: CRE 01-215 5319.

Ref: CRE 1060/78

Bed sheeting bounty. A notice in *Trade and Industry*, 23 June, reported that the Australian government had sent a reference to the Industries Assistance Commission on the question as to whether the Bed Sheeting Bounty Act 1977 should be amended so as to make bounty payable on certain printed bed sheeting.

It has now been announced that the public hearing will be held in Melbourne on 11 July.

Inquiries: CRE 01-215 5319.

Ref: CRE 1054/78

Undergarments, knitted sleepwear and hosiery. A notice in *Trade and Industry*, 23 June, reported that the Australian government had requested the Industries Assistance Commission to inquire into and to report by 28 July on the question of short-term assistance for the production of these goods in Australia.

It has now been announced that the public hearing will be held in Melbourne on 12 July.

Inquiries: CRE 01-215 5319.

Ref: CRE 1055/78
CRE 1057/78

Cheese. A notice in *Trade and Industry*, 23 June, reported that the Australian government had sent a reference to the Industries Assistance Commission on the question of according assistance to the production in Australia of cheese falling under tariff item 04.04.

It has now been announced that the public hearing will be held in Melbourne on 24 July.

Inquiries: CRE 01-215 5319

Ref: CRE 1056/78

Inks. A notice in *Trade and Industry*, 11 November, reported the dates of the public inquiry into the question of protection for the local industry manufacturing inks.

It has now been announced that the Industries Assistance Commission has issued its draft report which is being made available to interested parties to enable them to examine and comment on it before it is finally settled. The commission will hold a further public hearing in Canberra on 21 July to consider submissions.

A copy of the draft report may be obtained on loan from the Department of Trade, Room 336, 1 Victoria Street, London SW1H 0ET.

Inquiries: CRE 01-215 5319.

Ref: CRE 1737/76

Vices. Following the notice in *Trade and Industry*, 23 June, the Australian government has further announced that tariff quotas will apply to industrial vices from 1 July for one six monthly period but should the Industries Assistance Commission's final report not be acted upon by 31 December 1978, the quotas will be extended to 30 June 1979.

The quota allocation will be $100,000, value for duty (VFD), for each of the two six monthly periods (if necessary) in lieu of the ceiling of $150,000 VFD per annum previously applying.

Imports of industrial vices cleared for home consumption outside quota entitlement will continue to be subject to an additional duty of $12 per vice.

Inquiries: OTAR 01-248 5757 ext. 468/469/401.

Further information

In many cases further information on the notices published on these pages is available to British exporters from the Department of Trade. The main branches concerned are: Commercial Relations and Exports (CRE) Divisions, 1 Victoria Street, London SW1H 0ET (tel: direct dialling); and Overseas Tariffs and Regulations Section (OTAR), Export Data Branch, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757. In each case, the relevant information source is indicated at the end of the notice by its initials (OTAR or CRE) and, in the case of OTAR, the telephone extension.

Belgium

Clothing and fabrics treated with tris-. The *Moniteur Belge*, 115, 16 June, published a decree dated 5 June prohibiting the sale of clothing and fabrics used in the manufacture of clothing, which have been treated with tris- (2, 3 dibromopropyl) phosphate.

The decree came into force on 16 June 1978. Copies of this decree (in French) are available.

Inquiries: OTAR 01-248 5757 ext. 288/466/467.

Brazil

Reference prices of ball and roller bearings. Customs policy council resolution 3178, published in the *Diario Oficial* of 26 May, revoked resolution 1592 of 1973, and established new reference prices for ball and roller bearings, and parts therefor, under tariff heading 84.62.00.00.

Inquiries: OTAR 01-248 5757 ext. 476/474.

Reference prices for goods in heading 90.16. Customs policy council resolution 3177, published in the *Diario Oficial* 19 May, made the following amendments to the reference prices for tapes for tape-measures, under heading 90.16.31.00: Items (b) glass-fibre tapes, and (c) steel tapes, for tape measures were eliminated, and (b) steel tapes for tape measures, of up to 10 m in length, was established with a reference price of US 0.22 per metre, cif. The reference prices and sizes for tape measures themselves remain unchanged.

Resolution 3179, published in the *Diario Oficial* of 26 May, established reference prices for external micrometers under sub-heading 90.16.02.00, and for comparators and indicators in sub-heading 90.16.24.00.

Inquiries: OTAR 01-248 5757 ext. 476/474.

Reference prices for hand taps. Customs policy council resolution 3175, published in the *Diario Oficial* of 19 May, amended the description of hand taps subject to reference prices in heading 82.05.08.02 as follows:

(a) now reads 'Hand taps of carbon or chrome steel' instead of 'hand taps of carbon or chrome steel with cut or laminated thread'.
(b) now reads 'Hand taps of high-speed steel' instead of 'hand taps of chrome or high speed steel with rectified thread'.

All sizes and reference prices are unchanged.

Inquiries: OTAR 01-248 5757 ext. 476/474.

Ethiopia

Exchange control. The National Bank of Ethiopia has issued a supplementary list of goods for which foreign exchange will not be available.

The list includes the following goods:

Tuna fish; oats; soluble coffee; alcoholic beverages; potato and maize starch; albums; passenger cars; table lamps and lamps shades; sports bags; wedding gowns, saris, stoles, sarong odhane, loongis, tufted leisure wear, corduroy, gaberdine, velvet, pelts; cameras; advertising materials; ballpoint pens; plastic and nylon brooms and neck brushes.

Inquiries: OTAR 01-248 5757 ext. 472.

Indonesia

Carpets. The Indonesian government has announced that from 19 May there is a partial exemption of import duty on the import of polypropylene base sheet consisting of plastic strips of 5 mm width or less (tariff headings 51.04.40 and 51.04.50), used in carpet manufacture. The import duty is now 40 per cent and the sales tax 10 per cent.

Inquiries: OTAR 01-248 5757 ext. 469/401/468.

Wrought aluminium. The Indonesian government has announced, with effect from 19 May, an import duty surcharge on the import of wrought products of aluminium. On products plain or figured by rolling or pressing, not surface treated (tariff heading 76.03.10), the import duty now is 30 per cent and the sales tax 5 per cent. On rondels (tariff heading 76.03.20), the import duty is 50 per cent and the sales tax 5 per cent.

Inquiries: OTAR 01-248 5757 ext. 469/401/468.

Polyvinyl chloride. The Indonesian government has announced, with effect from 15 May, an import duty surcharge on the import of polyvinyl chloride (tariff heading 39.02.44) so that the import duty is now 25 per cent and the sales tax 5 per cent.

Inquiries: OTAR 01-248 5757 ext. 469/401/468.

Goods used in shipbuilding. The Indonesian government has announced, with effect from 2 June, total import duty and import sales tax exemption on the import of raw materials, machinery, equipment and spare parts necessary to build, repair and maintain ships.

The import duty and sales tax will both be nil. The granting of import duty and sales tax exemption will be given only by recommendation of the minister of industry or the minister of communications.

Inquiries: OTAR 01-248 5757 ext. 469/401/468.

Iraq

National development plan 1976-80. A semi-official translation of the above document is now available for inspection at the Statistics and Market Intelligence Library, Room D16, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757 ext. 368/369. After a period of 14 days copies will be available for loan: applications will be dealt with in strict order of receipt.

A summary of the plan is available on written request from CRE 5/1b, Department of Trade, 1 Victoria Street, London SW1H 0ET.

Kenya

Budget. The Kenyan Minister of Finance and Planning said in his budget speech on 15 June 1978 that 'no foreign exchange will be made available for the insurance of imports from 1 July. All goods purchased by Kenya importers must be insured with companies licensed to transact insurance business in Kenya'.

It is understood that there should be no problems concerning goods already shipped on a cif basis but unlikely to arrive in Kenya before 1 July.

Exporters of goods, the subject of a cif contract but *not yet* shipped, should arrange with the Kenya importer for the marine insurance element to be transferred to Kenya insurers.

Henceforth, goods exported to Kenya should be sold on a fob or c and f basis.

Inquiries: CRE 01-215 5226.

Malta

Import licensing. The Malta *Government Gazette*, 13 June, carried legal notice 71 of 1978 which had the immediate effect of adding Tissues: all types of facial tissues cut to size and folded, generally known as man-size tissues, normal size facial tissues, or boutique tissues' to the list of items requiring an import licence.

Inquiries: OTAR 01-248 5757 ext. 458/461.

Mexico

Import licences: electronic valves. Acuerdo of the Secretaria de Comercio published in the *Diario Oficial*, 15 June, states that import licences are now required for electronic valves in tariff heading 85.21.A.002, until 31 December 1978.

Inquiries: OTAR 01-248 5757 ext. 476/474.

Oman

Import duties. To protect local industry, the Minister of Commerce and Industry has announced that import duties of 25 per cent of cif value will be levied on bananas and potatoes, with effect from 1 May 1978.

Inquiries: OTAR 01-248 5757 ext. 475/420.

Portugal

Duty exemption on capital goods. Portuguese *Diario da Republica* 129, 6 June, published regulatory dispatch 129/78, which extends for a further year the validity of decree law 30/75 under which certain parts and accessories may be exempt from duty in accordance with decree law 65/70 when imported exclusively for use in the construction of machinery and other capital goods.

The following CCCN headings are affected: ex 39.02, 40.09, 40.14 (except tobacco pouches), ex 73.32, ex 73.35, ex 73.40. ex 84.55 and ex 98.08.

Inquiries: OTAR 01-248 5757 ext. 460.

South Africa

Customs tariff changes. The following amendments were published in the South African *Government Gazette*, 16 June.

R.1222 CCCN 39.07, 62.05 and 85.20 (1) Specific provisions at the existing rates of duty, are made for life-jackets classifiable within tariff headings Nos. 39.07 and 62.05 (2) Subheading no. 85.20.97 is restated.

Industrial rebates

R.1223 Items 306.08, 312.01 and 316.08 CCCN 29.22, 59.11, 32.12, 70.11, 85.20 and 85.24. The effect of this notice is that (a) provision is made for a rebate of the full duty on monomethylamine for the manufacture of explosives: (b) rubberised textile fabrics (excluding rubberised knitted or crocheted goods) may now be used under rebate of duty by the footwear industry for any purpose: and (c) the heading of item 316.08 is extended and provision is made for a rebate of full duty on glass envelopes, filaments, leading in wires, quartz burners and carbon resistors for the manufacture of electric discharge lamps.

General rebates

R.1224 Item 412.05. The provision for a rebate of duty on life-jackets is withdrawn.

Drawbacks and refunds of customs duty

R.1225 Items 502.02 and 511.16 CCCN 28.31 and 53.07 (1) Provision is made for a drawback of the full duty on sodium chlorite used in the bleaching of flowers for export (2) Provision is made for a drawback of the full duty on yarn of combed sheep's or lambs' wool (worsted yarn), not put up for retail sale, used in the weaving of fabrics for exports.

Inquiries: OTAR 01-248 5757.

Patents Act 1978. The new South African Patents Act 1978, received the presidential assent on 26 April 1978.

A patent may be granted, subject to certain provisions, for any new invention which involves an inventive step and which is capable of being used or applied in trade or industry or agriculture.

Anything which consists of the following is not patentable.

a discovery;
a scientific theory;
a mathematical method;
a literary, dramatic, musical or artistic work or any other aesthetic creation;
a scheme, rule or method for performing a mental act, playing a game or doing business;
a program for a computer; or the presentation of information.

The duration of a patent will be 20 years from the date of application.

A patent of addition may be granted to improve or modify an existing invention for which a patent has been granted. The term will be the unexpired term of the main patent, and no fees will be payable on renewal of the patent of addition.

The Patent Act 1978 enters into force on 1 January 1979, with the exception of section 21 which comes into force on promulgation of the act and section 32(b) which will come into operation on a date to be announced in the South African *Government Gazette*.

Section 21 is concerned with the establishment of a Patent Examination Board which will deal with the qualification and registration of patent agents and patent attorneys.

Section 32(6) deals with microorganisms not available to the public.

A copy of the South African *Government Gazette* containing the English text signed by the state president is available for public inspection in the Chancery House Annexe of the Science Reference Library (Holborn Division), Chancery House, Lower Ground Floor, Chancery Lane, London WC2 1AY.

Sri Lanka

Import duty changes. The Sri Lankan government has announced various import duty changes. The following changes were effective from midnight 4 May 1978:

Tariff heading/Description	General rate of duty
21.07	
B Being infants' and invalids' food approved by the Director of Health Services	Free
C Autolysed yeast	5%
D Other	50%
58.05	
Narrow woven fabrics, and narrow fabrics (bolduc) consisting of warp without weft assembled by means of an adhesive, other than goods falling within heading 58.06.	50%

The following changes were effective from midnight 5 May:

Tariff heading/Description	General rate of duty
48.01	
B Printing paper (other than newsprint and writing paper)	
i MG poster paper	12½%
ii Other	25%
H Other paper and paperboard	
i Tissue paper under 20 g per square metre	5%
ii Boxboard	5%
iii Other	50%
48.07	
B Paper and paperboard (other than printing or writing paper), coated or impregnated with artificial or synthetic resins (excluding adhesives)	25%
C Tarred, bituminised or asphalted paper and paperboard	25%
D Other	25%

Inquiries: OTAR 01-248 5757 ext. 420/475.

Suriname

Restriction on import of cars. The original prohibition has now been amended and the position is now as follows:

All vehicles under reference 87.02(a) of the customs tariff are affected to the following extent:

1 The import of all cars with an engine of more than 6 cylinders is prohibited.

2 Small cars defined as:

a all cars with a cylinder volume not exceeding 1300 cc.

b all cars with an empty weight proper not exceeding 1000 kg.

c all cars with a present cif Paramaribo price not exceeding US $3,500.

may be imported on the authority of an import licence.

3 Larger cars exceeding the small car definition but not having more than 6 cylinders will be imported subject to a graded import duty system and a new 'luxury tax'.

Inquiries: OTAR 01-248 5757 ext. 288/466/467.

Thailand

Repeal of special import fee on fabrics. The Thai Board of Investment issued notice 36/2520 which came into effect on 1 January 1978, whereby a special fee was placed on the import of woven fabrics and yarns coming under CCCN 51.04, 55.05-06, 55.07-09, 56.05-07, 60.01, and 62.02. This notice, and the special fee, have now been repealed by the issue of notice 17/2521 which came into effect on 6 June 1978.

Inquiries: OTAR 01-248 5757 ext. 401/468/469.

Import fee on adhesive plasters. The Thai Board of Investment has issued notice 16/2521 whereby special fees are imposed as follows:

1 A special fee of 30 per cent of the cif price is placed on the import of adhesive plasters **not** impregnated or coated with pharmaceutical substances under tariff no. 30.04a.

2 A special fee of 20 per cent of the cif price is placed on the import of adhesive plasters, impregnated or coated with pharmaceutical substances under tariff no. 30.04b.

To protect industries which have been granted promotional privileges, the Board of Investment shall determine which imports are subject to the special fees and inform the customs department accordingly.

This notice came into effect on 7 June 1978 and remains in force until 31 May 1979.

Inquiries: OTAR 01-248 5757 ext. 401/468/469.

Import fee on sodium hydroxide. The Thai Board of Investment has issued notice 15/2521 whereby a special fee of 30 per cent of the cif price is placed on the import of sodium hydroxide (caustic soda) under tariff heading 28.17a.

To protect industries which have been granted promotional privileges, the Board of Investment shall determine which imports are subject to the special fee and inform the customs department accordingly.

This notice came into effect on 6 June 1978 and remains in force until 31 May 1979.

Inquiries: OTAR 01-248 5757 ext. 401/468/469.

Oil and fat. The Thai Ministry of Public Health has issued notice 40 (1977) which comes into force on 16 July and gives the standards, quality, manufacturing and labelling regulations for oil and fat.

United Kingdom exporters can obtain copies of the regulations, on loan, from OTAR 01-248 5757 401/468/469.

United States

Motor vehicle lighting. The *Federal Register*, 15 June, published a final rule by the National Highway Traffic Safety Administration amending the colour specifications for motor vehicle signalling devices. The change modifies the acceptable colour co-ordinates for yellow (amber).

A copy of the text is available.

Inquiries: OTAR 01-248 5757 ext. 456/457/7312.

Power lawn mowers. The *Federal Register*, 7 June, published a rule proposed by the Consumer Product Safety Commission to extend the time for issuing a safety standard for various types of lawn mowers or withdrawing the proposal. A copy of the text is available from OTAR 01-248 5757 ext. 456/457/7312.

Imports of speciality steels under quota. The new quota opened on 14 June and although US Customs have not published their table of statistics, they have given the following summary of the EEC quotas for the products under restraint.

Item 923.20 Sheets and strip of stainless steel, the quota is still open.
Item 923.21 Plates of stainless steel, the quota is still open.
Item 923.22 Bars of stainless steel, the quota was filled at time of opening.
Item 923.23 Wire rod of stainless steel, the quota is open but nearly full.
Item 923.26 Alloy tool steel, the quota was filled at time of opening.

Inquiries: CRE 01-215 5397.

New pneumatic tyres on passenger cars. The National Highway Traffic Safety Administration announced in the *Federal Register*, 5 June an amendment to Federal Motor Vehicle Safety Standard 109 Pneumatic Tyres – Passenger Cars which adds four new metric type size designations to appendix A of the standard and establishes criteria for testing and labelling higher inflation pressure tyres.

The effective date was 5 June 1978 and further information can be obtained from Crash Avoidance Division, Office of Vehicle Safety Standards, National Highway Traffic Safety Administration, 400 Seventh Street SW, Washington DC 20590.

Inquiries: CRE 01-215 5397.

X-ray screens. The *Federal Register* 2 June, published a rule proposed by the Food and Drugs Administration to consider advocating the increased use of X-ray intensifying screens made from recently developed phosphor materials, to reduce radiation exposure.

Written comments should be sent by 29 November 1978 to Food and Drug Administration, Room 4-65, 5600 Fishers Lane, Rockville MD 20857.

A copy of the text is available.

Inquiries: OTAR 01-248 5757 ext. 456/457/7312.

Carbonates and bicarbonates. the *Federal Register* 13 June, published a rule proposed by the Food and Drugs Administration to affirm a list of carbonates and bicarbonates as safe food additives.

Written comments (4 copies) should be sent to Food and Drug Administration, Room 4-65, 5600 Fishers Lane, Rockville MD 20857

A copy of the text is available.

Inquiries: OTAR 01-248 5757 ext. 456/457/7312.

Consumer products containing nitrobenzene. The *Federal Register*, 5 June, published a general order by the Consumer Product Safety Commission requiring manufacturers of consumer products containing nitrobenzene to furnish the commission with detailed and specific information.

A copy of the text is available.

Inquiries: OTAR 01-248 5757 ext. 456/457/7312.

Carcinogens in consumer products. The *Federal Register*, 13 June published a statement by the Consumer Product Safety Commission on the general policy on consumer products containing substances which could induce a risk of cancer. Written comments (5 copies) should be sent by 11 October to Consumer Product Safety Commission, Washington DC 20207.

A copy of the text is available.

Inquiries: OTAR 01-248 5757 ext. 456/457/7312.

Statistics

The economy: selected indicators

Series are seasonally adjusted except where shown otherwise

	Gross domestic product (average estimate)	Consumers' expenditure	Fixed capital expenditure			Changes in stocks				Balance of payments		
				of which			of which					
			Total	Manufacturing industry	Distributive and service industries excl. shipping	Total	Manufacturing industry	Wholesalers	Retailers	Current balance	Visible balance	Invisible balance
	at 1970 prices		at 1970 prices			at 1970 prices				at current prices		
Base of index Series in Stock level at end-1977	1970	£ million	£ million			18,845 p	£ million 10,762	1,938	1,946	£ million		
1971	101.7	32 677	9 625	1 988	1 922	112	−148	52	18	1 074	279	795
1972	104.0	34 519	9 636	1 721	2 035	35	−145	48	15	126	−701	827
1973	110.8	36 132	10 233	1 730	2 377	1 365	597	102	379	−883	−2 354	1 471
1974	109.1	35 682	10 001	1 964	2 300	561	634	81	−109	−3 515	−5 195	1 680
1975	107.3	35 269	9 640	1 695	1 921	−842	−429	−111	−65	−1 617	−3 205	1 588
1976	109.8	35 406	9 444	1 633	1 900	97	5	23	9	−859	−3 510	2 651
1977	110.9	35 116	9 087	1 764	2 081	444	234	108	17	165	−1 612	1 777
1976 2nd qtr.	109.3	8 793	2 346	400	468	−12	−66	−20	−45	−281	−909	628
3rd qtr.	109.6	8 879	2 377	414	488	5	−2	14	16	−304	−1 097	793
4th qtr.	111.3	8 928	2 343	422	496	105	73	3	5	−279	−961	682
1977 1st qtr.	110.2	8 758	2 259	419	502	234	125	51	102	−493	−947	454
2nd qtr.	110.8	8 639	2 292	433	508	229	164	39	−5	−365	−764	399
3rd qtr.	111.1	8 829	2 265	456	530	−30	−31	5	−44	537	54	483
4th qtr.	111.4	8 890	2 271	457	541	−11	−25	13	−36	486	45	441
1978 1st qtr.	112.0	9 084 p	2 230 p	446	548		125	53	61	−305	−574	269
% change last 2 qtrs. on prev. 2 qtrs.	+0.7	+2.9	−1.2	+1.6	+4.9							
on a year earlier	+0.9	+1.6	−2.2	+7.4	+9.1							

	Industrial production		Personal expenditure		Prices and earnings					Labour (UK)			Visible trade (volume)	
	Total all industries	Total manufacturing industries	Retail sales	Cars: new registrations	Retail prices		Wholesale prices: all manufacturing industry		Average gross earnings of all employees (GB, all industries and services covered)	Unemployed excluding school leavers and adult students		Unfilled vacancies for adults	Export	Import
				monthly averages		% increase on a year earlier	basic materials and fuel used	manufactured products: home sales		mid-month count	% of total employees	mid-month count	On a balance of payment basis	
	at 1970 prices		at 1971 prices		(not seasonally adjusted)				(old series)				at 1975 prices	
Base of index £m in base year Series in	1970	1970	1971 16,296	thousands	Jan. 1974		1970	1970	Jan. 1970	thousands		thousands	1975 19,462	1975 22,667
1971	100.1	99.4	100.0	108.5	80.0	9.4	104.6	109.0	118.7	775.8	3.4	130.9	84.6	83.3
1972	102.3	102.0	105.3	138.6	85.7	7.1	109.2	114.8	134.0	854.9	3.7	147.3	84.5	92.4
1973	110.0	110.5	110.3	137.1	93.5	9.1	144.5	123.2	152.1	611.0	2.6	307.0	96.8	105.6
1974	106.3	108.9	109.0	102.8	108.5	16.0	215.3	152.0	179.1	599.7[1]	2.6[1]	302.7[1]	103.9	107.9
1975	100.6	102.2	106.7	97.2	134.8	24.2	235.4	188.7	226.6	929.0	3.9	150.0[1]	100.0	100.0
1976	101.3	103.2	106.5	104.7	157.1	16.5	299.0	219.6	261.9	1 269.8[1]	5.4[1]	120.4[1]	109.9	105.5
1977	102.5	103.8	103.6	107.1	182.0	15.8	340.1	261.7	288.5	1 378.1	5.8	155.6[1]	118.9	107.0
1977 1st qtr.	103.2	105.3	103.3	104	174.1	16.5	341.5	248.0	280.0	1 329.5	5.6	..	115.7	109.1
2nd qtr.	101.9	102.9	102.5	103	181.9	17.4	347.7	259.2	285.3	1 340.6	5.6	157.7	118.0	109.8
3rd qtr.	102.7	103.7	104.3	112	184.7	16.5	340.5	267.7	288.3	1 414.6	5.9	151.9	124.1	106.4
4th qtr.	102.2	103.2	104.4	110	187.4	13.1	330.6	272.1	300.4	1 427.8	6.0	160.1	117.9	102.6
1978 1st qtr.	103.2	104.1	106.3	129	190.6	9.5	326.7	279.0	310.8	1 409.4	5.9	187.7	120.3	114.3
2nd qtr.										1 372.7 p	5.7 p	210.3 p		
July	102.8	104.2	104.8	113	183.8	17.6	344.5	265.8	286.3	1 398.5	5.9	155.2	123.1	110.4
Aug.	102.7	103.3	104.7	116	184.7	16.5	338.8	268.1	287.7	1 410.3	5.9	153.4	123.4	101.3
Sept.	102.6	103.5	103.5	107	185.7	15.6	338.1	269.2	291.0	1 434.9	6.0	147.2	125.9	107.5
Oct.	102.0	103.0	102.7	116	186.5	14.1	333.8	271.0	295.8	1 431.5	6.0	156.0	119.4	101.3
Nov.	101.9	102.6	103.1	108	187.4	13.0	329.9	272.0	300.5	1 429.6	6.0	159.4	115.3	98.4
Dec.	102.8	104.0	106.9	104	188.4	12.1	328.0	273.3	304.8	1 422.3	6.0	165.0	118.9	108.1
1978 Jan.	102.9	103.7	104.9	125	189.5	9.9	324.9	277.1	306.3	1 419.2	5.9	180.3	112.2	114.6
Feb.	103.5	104.0	106.8	120	190.6	9.5	324.2	279.2	311.2	1 409.0	5.9	187.0	127.4	111.3
Mar.	103.2	104.5	107.0	142	191.8	9.1	331.0	280.6	314.8	1 400.0	5.9	195.8	121.4	116.9
Apr.	104.8 p	105.5 p	106.7	132	194.6	7.9	337.5 p	282.8 p	326.1 p	1 387.1	5.8	203.7	126.1	103.0
May			108.4	124	195.7	7.7	341.8 p	284.4 p		1 366.4	5.7	209.9	120.1 p	112.5
June										1 364.6 p	5.7 p	217.4 p		
% change latest 3 months														
on prev. 3 months	+1.3	+1.2	+0.9	+14.0	+2.4		+3.4	+2.2	+4.4	−2.6		+12.1	+2½	−½
on a year earlier	+1.0	−0.1	+4.9	+25.2	+8.2		−3.3	+10.7	+12.6	+2.4		+33.4	+5½	+3½

p Provisional pe Preliminary e Estimate .. Not available [1] Average of available months

Inquiries: 01-215 3453

Economic indicators of the industrial countries

The tables have been prepared for the convenience of users who do not have access to the sources themselves. International publications (as indicated) have been used, supplemented, where available, by later reports, denoted – e. The form of presentation adopted – indicators by subject – is for convenience only, and it must not be assumed that the indicators in the same table for different countries are strictly comparable. An attempt has been made to indicate major differences of definition, but the coverage and methods of collection vary considerably; this is partly due to different administrative procedures in various countries. Fuller details may be obtained from the sources indicated, and from the national publications of the countries concerned. Exchange rates are those used in the basic data sources. The group of industrial countries is taken as comprising the members of the Organisation for Economic Co-operation and Development (OECD), ie western Europe, north America, Japan, Australia and New Zealand. Consumer prices apart, New Zealand is excluded from OECD totals in that insufficient information is available.

The five tables in this article are published monthly. A full set of tables with commentary appears quarterly (see 2 June 1978).

Inquiries: 01-215 3442.

Table 1 **Industrial production** (excluding construction) seasonally adjusted

Indices 1970 = 100

	Belgium	Luxem-bourg	France	F.R. of Germany	Ireland	Italy r	Nether-lands	United Kingdom r	EEC [1]	Canada	United States	Japan r	OECD r
Weights in total	1.3	0.1	7.1	12.5	0.2	4.5	1.5	6.3	33.5	3.5	43.2	11.6	
1971	103	98.7	106	101.8	104	99.9	106	99.8	102	105.6	102.0	102.7	103
1972	109	102.8	112	105.7	109	104.4	111	102.1	107	113.0	111.0	110.1	110
1973	116	115.1	120	112.9	120	114.5	119	110.5	115	123.5	120.4	127.4	120
1974	120	119.1	123	111.3	122	119.0	125	108.5	115	127.4	119.9	122.5	120
1975	109	93.0	114	105.0	114	108.5	119	103.1	108	121.3	109.3	109.6	110
1976	118	98.9	124	112.7	125	121.1	126	104.3	115	127.4	120.4	121.7	120
1977	117	99.4	126	116.1	135	120.9	127	105.9	118	131.7	127.2	126.7	124
1975 1st quarter	111	101.4	113	104	114	110.2	120	107.8	108	121.3	105.0	107.2	108
2nd	107	92.3	113	104	113	107.0	117	102.3	106	120.7	106.0	108.8	108
3rd	106	83.2	112	104	114	105.9	115	101.1	106	120.8	111.8	111.0	111
4th	110	94.2	117	108	116	110.8	123	102.3	110	122.3	114.4	111.5	114
1976 1st quarter	114	97.5	123	111	121	116.6	124	102.6	113	125.7	118.1	116.9	117
2nd	119	103.7	123	113	123	120.7	126	104.5	115	128.0	120.0	121.0	119
3rd	118	96.6	125	114	126	122.7	127	104.2	116	127.5	121.4	123.5	120
4th	119	97.7	125	115	128	127.9	129	105.9	118	128.4	122.0	124.9	122
1977 1st quarter	120	100.1	129	117	130	131.3	127	107.1	120	131.1	123.9	126.4	124
2nd	118	103.4	125	116	135	122.1	128	105.4	117	131.5	127.1	126.3	124
3rd	114	94.4	125	116	134	121.2	125	105.9	117	131.5	128.4	126.2	125
4th	116	98.8	124	117	140	117.9	127	105.1	117	132.6	129.2	127.9	125
1978 1st quarter	119	106.4	128	117		123.8	126	106.7	119	132.7	129.6	131.6	126
1976 July	114	94.1	124	111		122.7	124	104.2	115	126.7	121.2	123.3	120
August	121	86.5	124	113		118.9	127	103.5	115	128.2	121.8	123.7	120
September	120	109.1	129	115		126.4	131	104.8	118	127.5	121.3	123.6	121
October	122	101.6	123	115		122.8	128	105.3	117	127.2	121.0	123.3	121
November	119	96.5	129	115		128.6	127	106.0	119	128.6	122.0	125.3	122
December	121	95.2	125	116		132.3	131	106.2	119	129.4	123.4	126.1	123
1977 January	121	101.6	129	117		131.3 e	129	107.1	120	131.5	122.7	126.9 e	123
February	119	96.7	127	116		131.2 e	126	107.0	119	130.8	123.6	125.2 e	123
March	121	102.0	129	118		131.5 e	127	107.0	121	131.1	125.5	127.0 e	125
April	118	100.0	125	116		123.1	132	105.8	118	130.7	126.3	126.3	124
May	119	105.6	123	115		125.8	127	107.0	117	131.5	127.1	125.9	124
June	118	104.5	128	116		117.4	126	103.5	117	132.5	127.8	126.7	124
July	111	97.9	124	115		119.5	124	106.0	116	131.0	128.7	124.7	124
August	119	84.7	124	116		120.4	124	105.9	117	132.0	128.1	127.1	125
September	114	100.7	126	117		123.6	126	105.8	118	131.5	128.5	126.9	125
October	112	94.4	122	116		117.7	126	104.8	116	131.8	128.8	126.1	125
November	117	103.2	127	117		119.7	125	104.7	118	132.7	129.2	128.3	125
December	120	98.7	122	119		116.2	130	105.7	117	133.2	129.6	129.3	126
1978 January	121	109.0	126	120		121.9	126	106.4	119	131.4	128.8	130.6	126
February	120	108.1	127	116		125.2	127	107.0	119	133.3	129.1	130.7	126
March	117	102.2	130	114		124.4	125	106.8	118	133.3	130.8	133.4	127
April			132 e	116 e			128 e	108.5			132.2		
May											133.0 e		
% change latest three months													
On previous three months	2.6	7.8	3.7	−2.8	4.5	5.1	−0.3	1.7	1.4	0.1	2.2	2.9	0.8
On a year earlier	−0.8	6.3	2.1	−1.1	9.4	−5.7	−1.3	0.8	−1.1	1.2	4.5	4.1	2.2

[1] Excluding Denmark. r Revised. e Estimate.
Source: United Kingdom, Department of Trade; all others 'OECD Main Economic Indicators'.

Regional Statistics No. 13 1977

Regional Statistics No. 13 1977 is an essential reference book for professionals with an interest in regional industry, economics, markets or social characteristics. Compiled by the Central Statistical Office, it provides in one volume a detailed quantitative picture of regional variations within the United Kingdom across a broad range of topics; the subject headings are: Regional profiles (which are a selection of key statistics for each separate region and for counties within it), Social characteristics, Social services, Health, Housing, Education, Employment, Energy, Production, distribution and investment, Agriculture, Transport, Personal incomes, Household expenditure and Regional economic accounts.

Notes are given in an appendix explaining the sources and definitions of the figures presented, and providing references to further material on each subject covered.

Price £6.50 (by post £7.04)

HMSO, PO Box 569, London SE1 9NH ISBN 0 11 630171 6

Table 3 **Unemployment** seasonally adjusted

Numbers thousands

	Belgium [3]	Denmark [1,7]	France [1]	F.R. of Germany [1,6]	Ireland [3]	Italy [4,6,8]	Netherlands [1,6,r]	United Kingdom [1,2]	Canada [4]	United States [4]	Japan [4]
1971	71	*30*	337	185	42	*613*	62	776	552	4 993	639
1972	87	*30*	380	246	48	*696*	108	885	562	4 840	730
1973	92	*21*	394	274	44	*669*	110	611	520	4 305	670
1974	105	*50*	498	583	48	*560*	135	600 [8]	521	5 076	740
1975	177	*124*	840	1 074	75	*654*	195	929	697	7 830	1 000
1976	229	*126*	933	1 060	84	*732*	211	1 270	736	7 288	1 080
1977	264	164	1 072	1 030	82	1 545	204	1 378	862	6 856	1 100
1975 3rd quarter	189	*123*	889	1 124	78	*648*	203	995	712	7 898	1 025
4th	210	*123*	924	1 141	81	*699*	210	1 128	726	7 729	1 114
1976 1st quarter	213	*118*	929	1 136	82	*681*	211	1 220	703	7 224	1 072
2nd	227	*115*	928	1 040	84	*693*	209	1 261	728	7 111	1 102
3rd	238	*120*	925	1 031	85	*776*	217	1 300	748	7 363	1 101
4th	238	*126*	942	1 014	84	*777*	206	1 313	770	7 443	1 038
1977 1st quarter	246	147	997	1 018	82	1 459	197	1 330	826	7 161	1 032
2nd	261	156	1 069	1 025	83	1 432	200	1 341	852	6 889	1 110
3rd	276	163	1 149	1 054	83	1 692	213	1 415	878	6 736	1 150
4th	276	171	1 069	1 023	80	1 598	205	1 428	900	6 554	1 126
1978 1st quarter	275	185	1 045	1 014		1 520	197	1 409	910	6 155	1 146
2nd								1 373			
1976 December	239	*128*	952	*1 011*	83		*199*	1 320	780	7 490	973
1977 January	242	142	974	*1 053*	82		*196*	1 330	786	7 066	1 005
February	245	147	999	*1 020*	82		*193*	1 330	835	7 273	1 032
March	250	153	1 017	997	83		196	1 329	858	7 145	1 057
April	254	153	1 037	1 016	82		194	1 334	868	6 869	1 030
May	262	156	1 066	1 019	83		200	1 324	840	6 894	1 127
June	267	159	1 105	1 041	83		205	1 364	848	6 904	1 172
July	272	161	1 140	1 059	83		208	1 399	866	6 719	1 189
August	282	163	1 174	1 059	84		217	1 410	881	6 821	1 143
September	275	165	1 132	1 043	82		213	1 435	887	6 668	1 118
October	272	167	1 092	1 034	81		209	1 432	887	6 688	1 055
November	283	171	1 065	1 027	81		206	1 430	903	6 663	1 150
December	272	176	1 051	1 009	79		200	1 422	911	6 310	1 172
1978 January	274	181	1 023	1 002	80		199	1 419	891	6 226	1 112
February	274	184	1 042	1 028	77		196	1 409	901	6 090	1 150
March	278	191	1 071	1 012			197	1 400	938	6 148	1 175
April	282	185	1 086	978			196	1 387	935	5 983	1 198
May	288 e			985 e				1 366		6 149	
June								1 365			
Rate % latest month	10.7 e	8.6	5.8	4.4 e	11.1	7.1	4.9	5.7	8.6	6.1	2.2
% change latest three months											
On previous three months	3.4	6.1	1.9	−2.1	−3.3	−4.9	−2.6	−2.6	2.6	−1.9	2.6
On a year earlier	10.7	23.6	4.8	−1.9	−4.5	4.2	n.a.	2.4	8.3	−12.6	13.0

Unemployment data are defined and collected on different bases in different countries. The following notes indicate main variations preventing direct international comparison. [1] Numbers registered at employment offices. Rates are calculated as percentages of total employees. [2] Excluding school leavers. [3] Insured unemployed. Rates are calculated as percentages of total insured population. [4] Labour force sample survey. Rates are calculated as percentages of total labour force. The quarterly data for Italy relates to January, April, July and October. [6] Estimated in the absence of one month's figures. [6] From 1977, new method of calculating unemployment which is not consistent with the previous figures. [7] From 1977, including unemployed insured for loss of part time jobs. [8] Not seasonally adjusted. [9] The seasonally adjusted figures have been revised; where revisions have not been published by OECD, the previous figures are shown in italics e Estimated. n.a. Not available. r Revised. Source: 'OECD Main Economic Indicators' and 'Department of Employment Gazette'.

Table 5 **Consumer prices** All goods and services

Indices 1970 = 100

	Belgium	Luxembourg	Denmark	France	F.R. of Germany	Ireland	Italy	Netherlands	United Kingdom	EEC	Canada	United States	Japan	OECD
1971	104.3	104.7	105.8	105.3	105.3	108.9	104.8	107.5	109.4	106.2	102.9	104.3	106.1	105.3
1972	110.0	110.1	112.8	111.7	111.1	118.4	110.8	115.9	117.2	112.7	107.8	107.7	110.9	110.2
1973	117.7	116.8	123.3	119.9	118.8	131.8	122.8	125.2	128.0	122.1	116.0	114.4	123.9	119.1
1974	132.6	128.0	142.1	136.3	127.1	154.2	146.3	137.3	148.4	138.0	128.6	127.0	154.2	134.3
1975	149.5	141.7	155.8	152.2	134.7	186.4	171.1	151.3	184.4	157.2	142.5	138.6	172.4	149.5
1976	163.2	155.6	169.8	166.8	140.8	219.9	199.8	164.6	214.9	175.0	153.2	146.6	188.4	162.5
1977	174.8	166.0	188.7	183.2	146.3	249.9	236.6	175.6	249.0	195.0	165.4	156.1	203.6	177.5
1976 1st quarter	158.7	151.1	162.0	161.1	139.0	206.3	185.0	159.0	204.4	167.9	149.8	143.7	181.4	157.5
2nd	161.9	154.5	168.5	164.8	141.1	219.1	196.7	164.3	211.9	173.4	152.1	145.5	187.7	161.1
3rd	164.9	157.0	171.1	168.6	141.2	222.4	202.2	165.4	216.8	176.4	154.3	147.8	189.8	163.8
4th	167.6	159.7	177.7	172.9	141.9	231.8	215.1	169.6	226.8	182.3	156.6	149.4	194.5	167.5
1977 1st quarter	170.9	163.4	179.6	175.6	144.6	240.7	225.2	170.8	238.2	188.0	159.9	152.1	198.8	171.6
2nd	173.7	165.9	185.4	181.0	146.5	249.7	233.8	175.8	248.8	194.0	163.7	155.3	204.2	176.4
3rd	176.3	167.0	190.0	185.3	146.9	252.4	239.7	176.9	252.7	197.3	167.3	157.6	204.8	179.5
4th	178.3	167.7	199.8	188.8	147.2	256.8	247.7	178.8	256.4	200.5	170.9	159.3	206.5	182.5
1978 1st quarter	180.6	168.9	202.6	191.8	149.1	260.5	254.0	179.0	260.8	203.8	174.0	161.9	207.4	185.6
1977 January	170.1	162.4	178.7	174.3	143.8		221.4	169.5	235.9	186.2	158.4	150.7	197.7	170.1
February	171.4	163.5	178.8	175.5	144.7	240.7	225.7	170.8	238.2	188.1	159.9	152.3	198.8	171.7
March	171.3	164.2	181.4	177.1	145.2		228.5	172.2	240.5	189.6	161.5	153.2	200.0	173.1
April	172.2	165.2	183.3	179.4	145.9		231.3	175.1	246.7	192.4	162.4	154.4	203.3	175.2
May	173.9	165.8	186.0	181.1	146.5	249.7	234.2	176.0	248.6	194.0	163.8	155.3	205.2	176.5
June	175.0	166.7	186.9	182.5	147.2		235.8	176.4	251.2	195.4	164.9	156.3	204.1	177.5
July	175.5	167.4	188.2	184.1	147.0		237.2	176.1	251.4	196.0	166.5	157.0	203.6	178.4
August	176.1	167.0	189.9	185.1	146.9	252.4	239.4	176.7	252.7	197.0	167.2	157.6	203.6	179.3
September	177.3	166.6	191.9	186.7	146.7		242.5	177.8	254.0	198.2	168.1	158.2	207.2	180.7
October	177.7	167.3	198.6	188.2	146.9		245.7	178.6	255.1	199.6	169.8	158.6	208.3	181.8
November	178.3	168.1	200.3	188.9	147.1	256.8	248.1	179.0	256.4	200.5	170.9	159.4	205.8	182.5
December	179.0	167.8	200.6	189.4	147.5		249.3	178.9	257.7	201.2	172.0	160.0	205.3	183.1
1978 January	179.9	168.5	201.8	190.3	148.4		251.4	178.0	259.2	202.4	172.6	160.7	206.2	184.2
February	180.7	168.9	202.6	191.7	149.2	260.5	254.0	178.8	260.7	203.8	173.8	161.9	207.1	185.5
March	181.1	169.4	203.5	193.4	149.7		256.6	180.2	262.4	205.2	175.7	163.2	208.9	187.0
April	181.3	170.4	204.3	195.5	150.1		259.5 e	181.4	266.2	206.8 e	176.1	164.5	211.2	188.7 e
May	181.5 e	170.6 e		197.4 e	150.5 e	265.2 e		181.8 e	267.7		178.5	166.0 e	212.4 e	
Percentage change														
Latest month on same month a year earlier	4.4	2.9	11.5	9.0	2.7	6.2	12.2	3.3	7.7	7.5	9.0	6.9	3.5	7.7
Latest three months on previous three months	0.8	1.0	1.3	2.6	1.2	1.8	2.8	1.4	2.4	1.9	2.3	2.3	2.2	2.1
Latest three months on a year earlier	5.1	3.1	12.3	9.1	2.9	6.2	12.3	3.8	8.2	8.0	8.7	6.7	3.9	7.9

Source: e Estimated. 'OECD Main Economic Indicators'.

Table 8 Exports (fob) Special trade [1], seasonally adjusted

US $ million

	Belgium/ Luxembourg	Denmark [2]	France	F.R. of Germany	Ireland [2]	Italy	Nether- lands	United Kingdom [2]	EEC	Canada [3]	United States [2]	Japan [2 3]	OECD [3]
1970	11 592	3 288	17 940	34 188	1 032	13 188	11 772	19 382	112 356	16 134	43 224	19 320	220 045
1971	12 081	3 609	20 592	39 009	1 308	15 177	13 953	22 365	128 084	17 676	44 211	23 994	246 037
1972	15 995	4 330	25 739	46 208	1 610	18 535	15 392	24 415	153 152	20 184	49 676	28 591	290 784
1973	22 416	6 120	35 952	67 440	2 124	22 236	23 952	30 632	210 684	25 200	71 316	36 936	398 880
1974	28 260	7 716	45 900	89 160	2 628	30 288	32 436	38 827	275 100	32 784	98 508	55 536	532 932
1975	28 812	8 712	52 212	90 024	3 216	34 824	34 440	44 270	295 992	32 304	107 652	55 752	567 804
1976	32 844	9 108	55 812	102 036	3 312	36 924	38 748	46 542	325 044	38 628	114 996	67 224	630 492
1977	37 488	10 068	63 516	117 936	4 392	45 036	43 680	57 526	379 620	41 556	120 168	80 496	744 660
1976 1st quarter	7 404	2 120	13 272	23 280	740	8 475	8 907	11 474	75 618	9 099	27 219	15 564	147 309
2nd	7 746	2 225	13 851	24 609	818	8 862	8 883	11 452	78 165	9 543	28 660	16 467	153 129
3rd	8 217	2 340	14 007	26 148	837	9 414	9 909	11 523	82 507	9 822	29 384	17 037	160 668
4th	9 144	2 445	14 586	27 456	886	9 972	11 001	12 093	87 727	9 576	29 450	17 787	166 884
1977 1st quarter	9 069	2 532	15 108	27 897	962	10 467	10 623	12 977	89 492	10 359	29 786	19 479	171 558
2nd	9 123	2 357	15 252	28 788	1 014	11 481	10 536	14 292	92 571	10 179	30 574	19 710	175 752
3rd	9 261	2 526	16 242	29 541	1 200	10 971	11 220	14 950	96 152	10 374	30 609	20 181	180 465
4th	9 849	2 709	17 465	32 048	1 226	12 064	11 635	15 307	102 812	10 477	29 485	21 237	188 869
1978 1st quarter [5]		2 676	17 325	32 394	1 363			17 062		10 757			
1976 October	3 103	789	4 806	8 998	302	3 302	3 442	3 916	28 691	3 197	9 782	5 930	*54 511*
November	2 910	817	4 816	8 990	289	3 440	3 699	3 940	29 001	3 122	9 235	5 804	*54 497*
December	3 131	839	4 965	9 468	294	3 230	3 861	4 238	30 034	3 257	10 433	6 053	*57 372*
1977 January	3 005	836	5 085	9 202	309	3 450	3 577	4 347	29 770	3 300	9 807	6 566	*56 679*
February	2 934	824	4 992	9 147	322	3 409	3 620	4 293	29 504	3 349	9 904	6 428	*56 459*
March	3 130	872	5 031	9 548	331	3 608	3 427	4 336	30 218	3 710	10 075	6 486	*58 154*
April	3 023	838	4 977	9 276	330	3 825	3 584	4 698	30 426	3 447	10 102	6 758	*58 149*
May	2 990	723	5 173	9 603	331	3 804	3 489	4 642	30 646	3 321	10 398	6 400	*58 385*
June	3 109	796	5 101	9 909	352	3 853	3 465	4 951	31 499	3 411	10 074	6 552	*59 582*
July	2 978	818	5 162	9 482	397	3 549	3 666	5 021	31 097	*3 522*	10 246	*6 910*	*59 282*
August	2 989	846	5 411	9 861	397	3 850	3 844	4 823	32 170	*3 432*	9 479	*6 661*	*59 806*
September	3 293	861	5 670	10 199	405	3 571	3 709	5 106	32 885	*3 336*	10 884	*6 565*	*61 438*
October	3 083	835	5 765	10 369	345	3 548	3 670	5 017	32 724	3 453	9 174	6 773	59 840
November	3 173	890	5 488	10 197	418	3 999	3 776	4 898	33 268	3 074	9 093	7 145	60 620
December	3 593	984	6 212	11 482	463	4 517	4 189	5 392	36 820	3 950	11 218	7 319	68 409
1978 January [5]	3 641	885	5 650	10 942	493	3 717	4 044	5 363	34 455	3 252		7 784	
February	3 228	947	5 724	10 772	417		4 083	6 031		3 939		8 193	
March		844	5 951	10 680	453			5 668		3 566			
April								5 657					
May													

[1] See notes to table 9 below.

Source: United Kingdom. Department of Trade; all others: 'OECD Series "A" '.

Table 9 Imports (cif) Special trade [1], seasonally adjusted

US $ million

	Belgium/ Luxembourg	Denmark [2]	France	F.R. of Germany	Ireland [2]	Italy	Nether- lands	United Kingdom [2]	EEC	Canada [2 4]	United States [2 4]	Japan [3]	OECD [3]
1970	11 352	4 380	19 116	29 808	1 572	14 940	13 392	21 696	116 280	13 308	39 960	18 876	225 649
1971	12 390	4 476	21 261	34 356	1 838	16 026	15 159	23 918	129 403	15 460	45 633	19 716	250 717
1972	14 879	4 988	26 696	39 759	2 113	19 252	17 127	27 877	152 643	18 924	55 819	23 463	297 984
1973	21 936	7 704	37 380	54 492	2 784	27 816	24 360	38 872	215 232	23 304	69 120	38 316	410 820
1974	29 700	9 852	52 824	68 976	3 816	40 968	33 204	54 344	293 568	32 292	100 968	62 112	583 020
1975	30 708	10 332	54 240	74 208	3 804	38 364	35 148	53 618	300 048	33 960	96 936	57 864	587 376
1976	35 352	12 420	64 392	87 780	4 200	43 368	39 948	56 269	343 428	37 956	121 788	64 800	676 308
1977	40 248	13 260	70 488	100 704	5 388	47 556	45 600	63 740	386 940	39 540	147 852	70 812	841 164
1976 1st quarter	7 656	2 823	14 925	19 836	999	9 984	8 826	13 335	78 602	9 249	27 308	14 946	154 935
2nd	7 995	3 000	15 495	20 967	994	10 644	9 378	13 942	82 413	9 567	29 290	15 546	162 039
3rd	8 427	3 165	16 413	22 475	1 068	10 737	10 086	14 386	86 680	9 582	32 024	16 863	173 049
4th	9 174	3 330	17 493	24 078	1 121	11 859	11 607	14 606	93 334	9 486	32 652	17 256	182 874
1977 1st quarter	9 513	3 317	17 409	24 170	1 258	11 781	11 292	15 322	94 292	9 885	35 405	17 664	186 291
2nd	9 483	3 240	17 196	24 115	1 271	12 276	11 214	16 429	95 020	10 119	37 721	17 484	190 467
3rd	9 414	3 385	17 721	25 593	1 422	11 010	11 514	15 779	95 812	9 948	37 600	17 832	192 681
4th	10 143	3 344	18 658	27 435	1 481	12 458	11 816	16 210	101 804	9 840	37 640	18 099	198 257
1978 1st quarter [5]		3 411	19 018	28 054	1 551			19 023		9 694			
1976 October	2 982	1 096	5 796	7 740	363	3 745	3 617	4 724	30 118	3 119	10 771	5 744	*58 934*
November	3 091	1 099	5 958	7 710	383	4 389	3 499	4 947	31 100	3 218	10 731	5 888	*61 315*
December	3 100	1 134	5 740	8 627	375	3 726	4 490	4 935	32 117	3 148	11 150	5 625	*62 477*
1977 January	3 204	1 087	5 912	8 220	443	3 821	3 846	5 520	32 116	3 243	11 371	6 009	*62 340*
February	3 102	1 038	5 702	7 834	406	4 008	3 807	4 872	30 794	3 319	11 697	5 732	*61 084*
March	3 206	1 192	5 796	8 116	410	3 950	3 637	4 930	31 382	3 321	12 337	5 922	*62 727*
April	3 150	1 022	5 515	7 745	406	4 167	3 727	5 183	30 872	3 425	12 593	5 859	*62 469*
May	3 171	1 085	5 740	8 170	426	4 206	3 727	5 394	31 863	3 391	12 334	5 850	*63 156*
June	3 161	1 134	5 943	8 201	439	3 902	3 761	5 851	32 285	3 302	12 793	5 775	*64 805*
July	2 854	1 073	5 692	8 606	461	3 700	3 788	5 475	31 510	*3 328*	12 781	*5 788*	*63 948*
August	3 390	1 137	6 052	8 393	468	3 736	3 963	4 936	32 140	3 257	12 167	*6 067*	*64 539*
September	3 171	1 175	5 975	8 594	493	3 574	3 762	5 369	32 161	*3 267*	12 652	*5 856*	*64 079*
October	3 148	1 089	5 944	8 557	472	4 144	3 741	5 337	32 562	3 268	11 954	5 769	63 591
November	3 390	1 092	5 429	8 773	477	3 910	3 911	4 998	33 321	2 961	11 581	6 006	64 162
December	3 605	1 163	6 285	10 105	532	4 404	4 164	5 875	35 921	3 611	14 105	6 324	70 504
1978 January [5]	3 723	1 147	5 503	9 824	582	3 700	4 171	5 334	35 935	3 024		6 234	
February	3 719	1 134	6 137	9 252	505		4 202	5 126		3 711		6 342	
March		1 130	6 378	8 978	464			6 563		2 959			
April								5 535					
May													

[1] For most purposes special trade may be defined as trade excluding re-exports. [2] General trade. [3] The OECD has revised the seasonally adjusted figures. It has been possible to include only the published revisions at this stage. For this reason the monthly figures in italics do not necessarily add to the quarters. [4] fob. [5] In these tables, from January 1978, the trade of Ireland and the United Kingdom is classified according to SITC Rev 2. The changes are described in an article in 'Trade and Industry' 10 February 1978, which also gives for the UK an indication of the magnitude of the change. It is thought that other countries have also adopted this classification from the beginning of 1978, but the extent of the discontinuity has not been ascertained. Percentage changes may be misleading and have therefore been omitted.

Source: United Kingdom, Department of Trade; all others: 'OECD Series "A" '

Retail sales in May

Volume

The final seasonally adjusted index of the volume of retail sales in May is 108.4 (1971 = 100), rather lower than the provisional estimate of 109, though still 1½ per cent higher than in April.

The volume of sales in the three months March to May was 1 per cent higher than in the previous three months and the average level of sales during the first five months of 1978 was about 3 per cent above the annual average for 1977.

For the main components of total trade, the volume of sales by clothing and footwear shops in the three months March to May was 2 per cent higher than in the previous three months. Sales by durable goods shops fell by 2 per cent (though 3 per cent greater than in the fourth quarter), while sales by 'other non-food' shops, which include department stores and mail order businesses, rose by 2 per cent. Sales by food shops rose by 1 per cent between these periods.

Value

Based on non-seasonally adjusted data, the value of total retail sales in May was 15 per cent higher than in May 1977. In the first five months of 1978 the average value of sales was 14 per cent higher than in the corresponding period of 1977.

Inquiries: 01-215 3705

Notes

The indices for all shops, food shops, and total non-food shops are shown to the first decimal place to help interpretation, but should not be regarded as necessarily accurate to the final digit. The best indication of the recent trend is normally obtained by comparing the average index for the latest three months with the average for the immediately preceding three months, but month-to-month fluctations may sometimes make it preferable to average two months or four months.

When using the volume figures, it should be borne in mind that, when price increases are large, the various problems associated with revaluation of the value series to constant prices become more acute. Thus, the relative accuracy with which volume changes have been measured is likely to have been reduced in recent periods.

The monthly periods consist of four weeks except those marked [1] which are of five weeks. The May 1978 sales period was the four weeks from 30 April 1978 to 27 May 1978. The corresponding period in 1977 was the four weeks from 1 May 1977 to 28 May 1977.

The value estimates are compiled inclusive of VAT, and will, therefore, reflect changes in the rates of VAT. The volume estimates, however, are not affected by these changes since the retail price indices used to 'deflate' the value data are themselves inclusive of VAT.

Within the total, sales are analysed by 'kinds of business'; ie the statistics are of sales by particular kinds of shop rather than of sales of particular commodities. For example, while sales by shops classified as food shops are mainly of food, many of them also sell other goods. Similarly, some food is sold by shops classified to other kinds of business.

The seasonally adjusted series include, where appropriate, adjustments for the timing of holidays and adjustments to make allowance for the inclusion of an extra week in the January 1975 trading period. No adjustments are made to the non-seasonally adjusted data.

The article giving the provisional estimate of the seasonally adjusted index of the volume of retail sales for June and the increase in the value of sales compared with a year earlier will be published later this month.

Hire purchase and other instalment credit business in May 1978

New instalment credit advanced by finance houses and retailers amounted to £471 million in May, after allowing for seasonal factors. Finance houses' lending was higher than in recent months; retailers' lending was marginally lower than in April. Total advances in the latest three months, March to May, were 7 per cent higher than in the previous three months, December to February. Finance houses' lending increased by 10 per cent between these two three-month periods and retailers' lending by 4 per cent.

The average weekly value of retailers' instalment credit sales in May was lower than in April. In the latest three months, March to May, average sales were 4 per cent higher than in the previous three months. Within this total, durable goods shops' sales increased by 1 per cent, department stores' sales (including those by Co-operative Societies) decreased by 2 per cent and other instalment credit retailers' sales (mainly mail-order business) increased by 6 per cent.

Table 1 Volume of retail sales seasonally adjusted

Index numbers of sales per week (average 1971 prices) 1971 = 100

(Sales in 1971 – £ million Final estimates)	All kinds of business (16 296)	Food shops (6 866)	Non-food shops Total (9 430)	Clothing and footwear shops (2 436)	Durable goods shops (1 897)	Other non-food shops [2] (5 097)
1971	100.0	100.0	100.0	100	100	100
1972	105.3	101.6	107.9	104	113	108
1973	110.3	101.6	116.6	108	127	117
1974	109.0	102.4	113.8	106	122	115
1975	106.7	100.0	111.5	106	119	111
1976	106.5	98.7	112.1	106	122	111
1977	103.6	94.8	110.0	105	119	109
1976						
1st qtr	105.9	99.5	110.6	105	117	111
2nd	106.9	99.6	112.1	106	122	111
3rd	107.3	99.1	113.2	106	125	112
4th	105.9	96.6	112.6	105	124	112
1977						
1st qtr	103.3	94.9	109.3	105	116	109
2nd	102.5	94.7	108.2	101	118	108
3rd	104.3	94.4	111.5	107	121	110
4th	104.4	95.3	111.1	109	121	109
1978						
1st qtr	106.3	96.6	113.3	110	125	111
1977						
May	103.2	95.0	109.2	104	117	109
June [1]	102.1	94.7	107.4	99	118	107
July	104.8	94.3	112.4	107	125	110
August	104.7	94.4	112.3	110	118	111
September [1]	103.5	94.4	110.2	106	121	108
October	102.7	94.2	108.9	103	120	108
November	103.1	93.9	109.8	107	118	108
December [1]	106.9	97.3	113.9	114	125	110
1978						
January	104.9	95.1	112.0	105	129	109
February	106.8	96.8	114.1	109	130	111
March [1]	107.0	97.6	113.8	115	117	112
April	106.7	96.5	114.2	108	132	111
May	108.4	98.9	115.4	113	126	112
1977-1978						
Dec-Feb	106.3	96.5	113.4	110	127	110
1978						
Mar-May	107.3	97.7	114.4	112	125	112
Percentage increase	0.9	1.2	0.9	2	−2	2

[1] Five-week period.
[2] Including department stores and mail-order businesses.

Table 2 Value of retail sales seasonally adjusted

Index numbers of value of sales per week (current prices) 1971 = 100

(Sales in 1971 – £ million Final estimates)	All kinds of business (16 296)	Food shops (6 866)	Non-food shops Total (9 430)	Clothing and footwear shops (2 436)	Durable goods shops (1 897)	Other non-food shops [2] (5 097)
1971	100.0	100.0	100.0	100	100	100
1972	112.0	109.0	114.2	112	118	114
1973	126.9	123.0	129.8	128	136	128
1974	146.7	144.9	148.1	148	144	149
1975	174.4	175.0	174.0	171	168	178
1976	200.1	204.8	196.7	189	187	204
1977	228.0	234.7	223.1	216	206	233
1976						
1st qtr	189.6	193.4	186.8	179	177	194
2nd	196.1	200.3	193.0	187	185	199
3rd	203.4	208.0	200.1	193	190	207
4th	211.4	217.4	207.0	198	197	215
1977						
1st qtr	216.4	223.8	211.0	204	192	222
2nd	222.0	230.4	215.8	204	202	227
3rd	234.2	239.4	230.4	224	213	240
4th	239.4	245.3	235.1	231	219	243
1978						
1st qtr	246.0	249.5	243.5	237	228	252
1977						
May	222.9	230.3	217.5	209	199	228
June [1]	222.9	233.5	215.2	202	202	227
July	231.5	236.6	227.8	220	213	237
August	235.8	239.5	233.0	230	209	243
September [1]	235.0	241.4	230.3	222	217	239
October	234.2	241.7	228.7	218	214	239
November	236.3	242.3	231.9	228	213	241
December [1]	246.0	250.6	242.7	244	227	248
1978						
January	241.0	245.0	238.0	223	233	247
February	246.5	249.4	244.4	235	237	252
March [1]	249.8	253.2	247.3	250	217	257
April	250.3	252.3	248.9	235	250	255
May	255.2	260.0	251.6	250	236	258
1977-1978						
Dec-Feb	244.6	248.5	241.8	235	232	249
1978						
Mar-May	251.6	255.0	249.1	245	233	257
Percentage increase	2.9	2.6	3.0	5	1	3

[1] Five-week period.
[2] Including department stores and mail-order businesses.

Table 1 Hire purchase and other instalment credit business seasonally adjusted

£ million

	Total		Finance houses[1]		Retailers[2]	
	New credit extended	Change in debt	New credit extended	Change in debt	New credit extended	Change in debt
1971	2 036	251	990	165	1 046	86
1972	2 466	438	1 222	296	1 244	142
1973	2 846	444	1 453	332	1 393	112
1974	2 508	−164	1 037	−160	1 471	−4
1975	2 981	−13	1 201	−55	1 780	42
1976	3 586	343	1 535	202	2 051	141
1977	4 392	625	2 072	500	2 320	125
1976						
1st qtr	833	37	340	8	493	29
2nd	872	79	382	55	490	24
3rd	913	100	392	56	521	44
4th	968	127	421	83	547	44
1977						
1st qtr	1 007	144	457	89	550	55
2nd	1 047	136	486	118	561	18
3rd	1 149	186	544	148	605	38
4th	1 189	159	585	145	604	14
1978						
1st qtr	1 260	245	626	182	634	63
1977						
June	345	42	163	34	182	8
July	360	51	164	40	196	11
August	402	75	199	64	203	11
September	387	60	181	44	206	16
October	378	45	179	39	199	6
November	401	53	198	45	203	8
December	410	61	208	61	202	—
1978						
January	429	85	213	62	216	23
February	418	82	201	57	217	25
March	413	78	212	63	201	15
April	463	93	231	66	232	27
May	471	82	243	74	228	8
1977						
Dec-Feb 1978	1 257	228	622	180	635	48
1978						
Mar-May	1 347	253	686	203	661	50
Percentage increase	7		10		4	

[1] Direct business only: ie excluding agreements block discounted with finance houses by retailers. [2] Durable goods shops, department stores and 'other instalment credit retailers'. For further definitions see footnotes to table 2. r. Revised.

Table 2 Retailers' instalment credit sales seasonally adjusted

Index numbers of value of sales per week (current prices) 1971 = 100

	Total[1]	Durable goods shops	Department stores	Other instalment credit retailers[2]
(HP and other instalment credit sales in 1971 £ million[3])	(1130)	(370)	(139)	(621)
1971	100	100	100	100
1972	117	117	106	120
1973	132	119	119	143
1974	139	94	122	169
1975	165	115	143	200
1976	190	136	162	229
1977	217	142	171	272
1976				
1st qtr	185	136	166	217
2nd	184	134	151	221
3rd	193	136	165	234
4th	200	138	166	244
1977				
1st qtr	205	135	166	256
2nd	210	136	153	266
3rd	227	148	179	284
4th	227	148	184	283
1978				
1st qtr	237	167	183	291
1977				
June [4]	205	136	162	256
July	220	147	170	275
August	229	144	171	292
September [4]	231	151	194	286
October	224	141	179	282
November	228	147	189	285
December [4]	228	155	183	281
1978				
January	243	180	187	293
February	244	166	189	302
March [4]	228	157	175	281
April	262	185	178	326
May	256	168	196	321
1977				
Dec-Feb 1978 av.	238	166	186	291
1978				
Mar-May av.	247	169	182	307
Percentage Increase	4	1	−2	6

[1] Durable good shops, department stores (including co-operative societies) and 'other instalment credit retailers'. [2] General stores (other than department stores) and general mail-order houses. [3] Excluding sales against checks issued by other organisations. [4] The monthly periods for retailers consists of four weeks except those marked [4] which are of five weeks. The period covered by May 1978 sales was the four weeks from 30 April 1978 to 27 May 1978. The corresponding period in 1977 was from 1 May 1977 to 28 May 1977.

The debt outstanding to finance houses and retailers increased by £82 million in May, bringing the total increase in the three months March to May to £253 million, compared to £228 million in December to February. Amounts outstanding to finance houses increased by £203 million and those to retailers by £50 million during the latest three-month period. At the end of May, the total amount outstanding to finance houses and retailers was £3,689 million (*not* seasonally adjusted), 28 per cent more than a year earlier.

Inquiries: Departments of Trade, Industry, and Prices and Consumer Protection, Economics and Statistics Division 6a, Room 349, Sanctuary Buildings, 20 Great Smith Street, London SW1P 3DB, tel. 01-215 3162.

'T & I' index inquiries

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Regional selective assistance

The tables show, on a regional basis, the number and value of applications received and offers made under Section 7 of the Industry Act during March and April 1978.

Region	Applications received		Offers Made	
	No of projects	Value (£'000)	No of projects	Value (£'000)
March 1978				
Scotland	11	1 050	18	2 480
Wales	20	3 261	16	382
Northern	31	7 215	7	360
North West	32	7 884	31	691
Yorkshire and Humberside	25	4 525	13	297
South West	1	75	4	34
East Midlands	6	579	5	72
West Midlands	1	30	—	—
Total	127	24 619	94	4 316
April 1978				
Scotland	18	2 351	9	1 653
Wales	17	2 444	17	1 451
Northern	17	6 731	11	1 248
North West	31	23 361	45	5 738
Yorkshire and Humberside	8	641	15	264
South West	7	664	1	73
East Midlands	3	181	3	14
West Midlands	1	66	—	—
Total	102	36 439	101	10 441

Inquiries: 01-211 4216.

New companies registered in Northern Ireland in May

The number of new companies registered in Northern Ireland in May and nominal capital are as follows:

	May 1978	January to May 1978	May 1977
Private companies limited by shares	53	307	58
Private unlimited companies	—	—	—
Public companies limited by guarantee not having a share capital	—	2	2
Private companies limited by guarantee not having a share capital	1	7	1
Total nominal capital of companies incorporated	£2 153 700	£13 678 326	£2 162 200

Inquiries: Belfast 3421.

Made-up clothing: orders and deliveries in March

In the three months ended March 1978 deliveries by the clothing industry were provisionally estimated to have been 3 per cent higher than in the preceding three months while net new orders were 2 per cent higher. Orders-on-hand at the end of March 1978 were 1 per cent higher than the end-December 1977 level. (These comparisons are based on the seasonally adjusted series in the accompanying tables.)

In using the index numbers shown in the table, it should be borne in mind that, when price increases are large, the various problems associated with constructing a constant value series become more acute. Because of these difficulties the relative accuracy of the estimates is likely to have been reduced in recent years.

Made-up clothing

Index numbers of total orders and deliveries

	Orders-on-hand (end period)		Net new orders		Deliveries	
	December 1969 = 100		Average 1970 Deliveries = 100		Average 1970 Deliveries = 100	
1968	107		100		97	
1969	100		97		97	
1970	103		102		100	
1971	119		108		104	
1972	125		110		109	
1973	155		123		117	
1974	145		115		114	
1975	142		118		115	
1976	135		118		114	
1977 p	139		124		121	
	Actual	Seasonally adjusted	Actual	Seasonally adjusted	Actual	Seasonally adjusted
1976						
1st qtr	126	132	109	111	113	114
2nd	148	135	126	116	107	109
3rd	134	145	108	128	121	120
4th	135	134	129	117	118	114
1977						
1st qtr	145	151	127	130	122	124
2nd	154	140	123	116	115	120
3rd p	131	141	113	135	121	121
4th p	139	138	132	125	124	122
1978						
1st qtr	134	140	121	128	120	126
1976						
Jan	129	134	94	112	102	122
Feb	128	135	115	112	116	112
Mar	126	132	117	110	119	109
Apr	132	129	128	118	105	107
May	151	133	149	123	111	117
Jun	148	135	101	108	103	104
Jul	147	145	102	139	117	121
Aug	136	143	88	118	108	119
Sep	134	145	135	128	136	121
Oct	132	137	151	115	133	113
Nov	138	135	141	116	123	114
Dec	135	134	94	120	99	115
1977						
Jan	143	148	113	135	108	129
Feb	139	147	127	123	129	124
Mar	145	151	140	131	129	119
Apr	153	150	133	123	115	118
May	161	143	136	107	116	117
Jun	154	140	101	119	113	125
Jul	139	137	110	150	122	126
Aug	132	139	95	128	108	119
Sep	131	141	133	126	133	118
Oct p	130	135	145	111	142	120
Nov p	136	133	136	111	125	116
Dec p	139	138	114	153	107	131
1978						
Jan p	133	138	103	123	107	128
Feb p	130	137	126	123	129	123
Mar p	134	140	135	138	126	127

p Provisional.

Carpet industry sales in March

The daily rate of carpet manufacturers' sales by value in March 1978 at current prices was provisionally estimated to have been 7 per cent more than in March 1977 assuming 21 working days in March 1978 and 23 working days in March 1977. In the three months ended March 1978 the daily rate of manufacturers' sales was provisionally estimated to have been 4 per cent more than in the corresponding period 12 months ago assuming 62 working days in the period ended March 1978 and 63 working days in the period March 1977. The index numbers which are of manufacturers' sales by value, have been adjusted for the length of the working month, but not for non-statutory holidays or other seasonal factors. The wholesale price index of carpets is shown as a guide to the movement in prices.

Inquiries: 01-212 0017

Index of carpet manufacturers' sales

1970 = 100

	Index of manufacturers' sale at current prices	Wholesale price index
1969	93	96.6
1970	100	100.0
1971	115	104.9
1972	135	111.7
1973	166	130.2
1974	179	153.1
1975	202	177.8
1976	234	211.3
1977	255	249.8
1977		
1st qtr	260	239.3
2nd	239	249.6
3rd	230	252.3
4th	292	257.7
1978		
1st qtr	270	268.5
1976		
December	273	228.5
1977		
January	245	237.3
February	265	239.2
March	269	241.5
December	286	258.6
1978		
January	253	265.6
February	268	269.8
March	288	270.0

Hosiery and other knitted goods: index of production in March

In the three months ended March 1978 the volume of production of hosiery and other knitted goods, seasonally adjusted (including knitted fabrics), was provisionally estimated to have been 2 per cent more than in the three months ended March 1977.

In using the index numbers shown in the table, it should be borne in mind that, when price increases are large, the various problems associated with constructing a constant value series become more acute. Because of these difficulties the relative accuracy of the estimates is likely to have been reduced in recent years. The actual figures allow for differences in the length of calendar months, but not for other seasonal variations.

Inquiries: 01-212 0017 or 01-212 6474.

Hosiery and other knitted goods, including warp knitting

1970 = 100

1968	88	
1969	98	
1970	100	
1971	99	
1972	99	
1973	103	
1974	100	
1975	96	
1976	101	
1977 p	101	
	Actual	Seasonally adjusted
1976		
1st qtr	90	97
2nd	95	98
3rd	101	105
4th	118	105
1977		
1st qtr	94	101
2nd	94	96
3rd p	100	103
4th p	114	102
1978		
1st qtr	95	103
1976		
January	85	101
February	94	99
March	91	91
April	92	101
May	98	99
June	96	95
July	93	107
August	97	105
September	113	102
October	133	107
November	126	103
December	96	106
1977		
January	92	107
February	96	101
March	94	95
April	91	99
May	96	97
June	95	93
July	93	107
August	33	100
September	114	103
October p	126	100
November p	119	97
December p	93	109
1978		
January p	89	102
February p	100	106
March p	96	100

Capital expenditure of the manufacturing, distributive and service industries: first quarter

Manufacturing industries

The revised estimate of the volume of investment in the first quarter of 1978 for manufacturing industry of £446 million at 1970 prices seasonally adjusted is £3 million higher than the provisional figure and 2 per cent below the fourth quarter of 1977. A longer term comparison, to remove more of the irregularities in the series, of the latest two quarters with the preceding two quarters shows a rise of over 1 per cent indicating that the upward trend in investment since the first quarter of 1976 may have flattened somewhat in these two quarters.

Investment by industry groups is more irregular on a quarterly basis than for manufacturing as a whole and therefore comparison of changes has been made for the two most recent quarters compared with the preceding two. On this basis both the vehicles and the coal and petroleum products industry groups have substantial increases of 22 per cent. Moderate increases were recorded for the chemicals and the paper, printing and publishing industries of 4 per cent and 3 per cent respectively and about average increases occurred in the engineering and the non-ferrous metals industries. The remaining four industry groups all recorded falls with the largest being 6 per cent for both the iron and steel and the food, drink and tobacco industries. In the latter case this is a reflection of historically high investment in the second and third quarters of 1977.

On basis of the same half yearly comparison, investment by type of asset showed rises of 4 per cent in new building work and 2 per cent in plant and machinery and a fall of 6 per cent in vehicles.

Table 1 Fixed capital expenditure at 1970 prices seasonally adjusted of manufacturing, distributive and service industries

£ million

		Analysis by industrial sectors			Analysis by type of asset		
Period	Total	Manufacturing industries	Distributive and service industries (excluding shipping)	Shipping industry	New building work	Vehicles	Plant and machinery
1966	3 228	1 774	1 334	120	938	556	1 733
1967	3 314	1 738	1 407	170	939	603	1 772
1968	3 703 (3 615) [1]	1 851 (1 800) [1]	1 561 (1 554) [1]	290 (260) [1]	963	759 (729) [1]	1 980 (1 922) [1]
1969	3 893 (3 981) [1]	1 978 (2 029) [1]	1 683 (1 690) [1]	233 (263) [1]	1 044	728 (758) [1]	2 120 (2 178) [1]
1970	4 294	2 130	1 799	364	1 063	859	2 372
1971	4 274	1 988	1 922	364	1 102	833	2 338
1972	4 237	1 721	2 035	482	989	1 018	2 230
1973	4 605	1 730	2 377	498	1 032	1 124	2 449
1974	4 679	1 964	2 300	415	1 033	1 058	2 589
1975	3 956	1 695	1 921	340	844	841	2 272
1976	3 735	1 633	1 900	202	769	782	2 184
1977	4 090	1 764	2 081	245	775	902	2 413
1971							
1st qtr	1 052	513	468	71	276	186	590
2nd	1 079	498	477	104	273	225	581
3rd	1 089	498	491	100	276	218	595
4th	1 054	479	487	89	277	205	572
1972							
1st qtr	1 044	455	481	109	251	230	563
2nd	1 064	425	512	128	249	259	557
3rd	1 041	421	512	108	241	249	551
4th	1 088	421	530	137	249	280	559
1973							
1st qtr	1 180	435	588	157	265	310	604
2nd	1 105	417	588	101	257	251	597
3rd	1 128	450	585	93	263	254	611
4th	1 193	429	617	148	247	310	636
1974							
1st qtr	1 189	497	617	75	276	242	670
2nd	1 163	488	578	97	259	258	646
3rd	1 163	487	555	121	253	280	629
4th	1 165	493	551	121	244	277	644
1975							
1st qtr	1 040	456	482	102	223	235	581
2nd	1 011	433	484	95	219	215	577
3rd	978	409	486	82	205	203	569
4th	928	398	469	61	197	187	544
1976							
1st qtr	908	397	448	64	190	194	525
2nd	895	400	468	27	190	173	532
3rd	976	414	488	74	195	227	554
4th	955	422	496	37	194	188	574
1977							
1st qtr	989	419	502	69	183	226	581
2nd	998	433	508	57	187	223	587
3rd	1 044	456	530	58	202	230	612
4th	1 059	457	541	61	202	223	633
1978							
1st qtr	1 031	446	548	38	190	213	628

The figures given above cover a wide sector of the economy, accounting – after exclusion of dwellings – for some 48 per cent of all UK gross domestic fixed capital formation in 1976. The scope of manufacturing and the distributive and service industries is defined in the notes at the end of the article, and falls very largely in the private sector of the economy, although some public sector elements are included as appropriate (notably the British Steel Corporation, in manufacturing industry). Exploration and development work in the North Sea (order II is excluded.

[1] After allowing for expenditure, brought forward into 1968 and 1969 to secure the higher rate of investment grants which ended on 31 December 1968: estimated at £51 million for manufacturing industry. £7 million for distributive and service industries, and £30 million for shipping. The estimate for shipping is particularly uncertain because of the erratic nature of this industry's capital expenditure, while that for the distributive and service industries is uncertain because of the smallness of the effect.

Distributive and service industries (excluding shipping)

Revised figures (incorporating additional returns) indicate that the capital expenditure of the distributive and service industries (excluding shipping) in the first quarter of 1978 was about £548 million, at 1970 prices, seasonally adjusted, £4 million more than the provisional estimate, and 1 per cent higher than in the fourth quarter of 1977. In the latest two quarters, investment by these industries has been about 5 per cent higher than in the previous two quarters: this rise is almost entirely attributable to an increase of some 10 per cent in the expenditure on plant and machinery. Investment in vehicles rose only slightly and there was little change for new building work.

In the classification according to industry groups, both wholesalers and retailers reduced their investment slightly in the latest two quarters, compared with the previous two quarters, but expenditure in the residual group of industries rose by about 8 per cent.

Shipping industry

The revised estimate for the investment by the shipping industry in the first quarter of 1978 is about £38 million, at 1970 prices, seasonally adjusted, £2 million more than the provisional estimate. This quarterly series is subject to so much fluctuation that comparisons should be made only over fairly long periods.

Inquiries: Manufacturing industry 01-215 3175/3176. Distributive and service industries 01-215 3345.

Notes to tables

Capital expenditure comprises expenditure on vehicles (including ships) and plant and machinery less receipts from sales of these assets, and on new building work.

The analysis by industry group follows the standard industrial classification revised 1968 edition:

Manufacturing orders III to XIX

Distributive trades order XXIII

Wholesale MLH 810, 811, 812, 831, 832 (except leasing by finance houses and similar businesses)

Retail MLH 820, 821

Other industries order XX (construction): XXII (transport and communication) excluding 701 – railways, 706 – port and inland water transport, 707 – air transport and 708 – postal services and telecommunications: XXIV (insurance, banking, finance and business services) including leasing by finance houses and similar businesses and excluding Trustee Savings Banks; XXV (professional and scientific services) excluding 872 – educational services and 874 – medical and dental services; and XXVI (miscellaneous services).

SIC orders I (agriculture, forestry and fishing), II (mining and quarrying), XXI (gas, electricity and water), and XXVI (public administration and defence) are completely excluded.

The estimates with the exception of those for manufacturing industry in table 2, are shown to the nearest £m but should not be regarded as accurate to this degree and care should be taken in using the industry figures in tables 2 and 3, because of the margins of error involved in the quarterly seasonal adjustments. Also, there may be an apparent discrepancy between the total and the sum of the constituent parts due to rounding.

See also footnotes to table 1.

Table 2 Fixed capital expenditure of manufacturing industry at 1970 prices seasonally adjusted

£ million

Period	Total all manufacturing industries	Analysis by industry group: Food, drink and tobacco	Coal and petroleum products	Chemicals	Iron and steel [1]	Non-ferrous metals [1]	Engineering shipbuilding and metal goods	Vehicles	Textiles leather and clothing	Paper printing and publishing	Other manufacturing industries	Analysis by type of asset: New building work	Vehicles	Plant and machinery
1970	2 129.8	246.4	82.8	382.3	154.8	101.6	422.3	233.4	170.9	134.2	201.1	391.2	114.7	1 623.9
1971	1 988.0	247.9	118.4	333.4	228.5	67.1	373.9	148.9	144.4	110.5	215.0	353.0	114.8	1 520.2
1972	1 720.8	253.9	100.3	238.1	213.6	39.3	340.4	98.0	119.2	100.6	217.4	287.1	123.3	1 310.4
1973	1 730.3	263.5	39.2	180.8	167.9	30.9	391.0	138.4	168.8	112.8	237.0	266.7	130.6	1 333.0
1974	1 964.4	285.8	42.6	216.0	204.0	38.8	463.9	155.0	183.6	129.5	245.2	295.0	140.2	1 529.2
1975	1 694.9	221.9	50.5	263.9	233.8	33.2	370.6	123.2	127.0	102.5	168.3	252.8	105.4	1 336.7
1976	1 632.8	215.0	51.6	262.8	259.5	21.2	341.0	130.3	95.4	85.4	170.6	213.8	121.3	1 297.7
1977	1 763.8	276.8	48.1	297.4	193.9	26.1	380.7	147.1	86.5	94.4	212.8	228.8	149.6	1 385.4
1971 1st qtr	513.3	62.6	26.0	88.8	51.0	21.4	103.0	40.3	40.9	28.1	51.1	90.4	28.0	394.9
2nd	498.0	60.6	26.6	78.6	52.9	18.5	96.2	40.6	39.6	29.2	55.2	89.1	29.0	379.9
3rd	498.0	62.8	31.7	84.6	60.1	16.7	91.1	36.4	32.2	27.1	55.3	86.0	28.6	383.4
4th	478.7	61.9	34.1	81.6	64.5	10.5	83.3	31.6	31.7	26.1	53.4	87.5	29.2	362.0
1972 1st qtr	454.6	58.9	30.9	68.9	73.7	9.5	81.7	26.0	26.0	22.0	57.0	76.4	28.1	350.1
2nd	424.7	61.2	26.6	62.3	50.1	11.7	80.5	23.2	30.1	25.4	53.6	73.2	29.5	322.0
3rd	420.5	67.1	22.2	56.8	44.7	8.4	87.7	23.2	30.1	26.3	54.0	71.8	32.1	316.6
4th	421.0	66.7	20.6	50.1	45.1	9.7	90.5	25.6	33.0	26.9	52.8	65.7	33.6	321.7
1973 1st qtr	435.0	70.2	17.8	47.3	47.1	7.8	91.5	31.8	38.2	28.8	54.5	64.6	33.1	337.3
2nd	416.7	59.4	17.9	46.4	30.8	6.8	97.3	32.9	38.9	27.9	58.4	64.1	31.3	321.3
3rd	449.6	63.9	13.9	43.6	47.3	8.0	100.7	36.5	45.6	28.0	62.1	69.3	33.2	347.1
4th	429.0	70.0	10.4	43.5	42.7	8.3	101.5	37.2	46.1	28.1	62.0	68.7	33.0	327.3
1974 1st qtr	496.5	75.6	9.5	48.8	44.2	9.1	121.1	40.2	47.9	30.8	69.3	76.9	35.0	384.6
2nd	488.2	73.8	9.4	49.9	48.3	10.5	114.1	39.0	47.3	33.3	62.6	73.3	35.6	379.3
3rd	486.7	71.9	10.8	53.9	46.9	9.7	116.1	39.0	46.4	32.5	59.5	71.1	35.9	379.7
4th	493.0	64.5	12.9	63.4	64.6	9.5	112.6	36.8	42.0	32.9	53.8	73.7	33.7	385.6
1975 1st qtr	455.5	61.1	12.3	66.8	51.9	13.1	103.2	34.5	36.2	28.5	47.9	68.7	28.8	358.0
2nd	432.5	57.1	13.5	67.9	57.1	6.6	97.0	31.3	32.8	25.4	43.8	65.8	25.3	341.4
3rd	409.2	50.7	14.3	67.4	60.2	6.9	88.5	28.0	29.3	25.9	38.0	62.0	25.1	322.1
4th	397.7	53.0	10.4	61.8	64.6	6.6	81.9	29.4	28.7	22.7	38.6	56.3	26.2	315.2
1976 1st qtr	396.5	49.7	15.3	58.7	69.4	5.7	83.6	27.8	26.3	22.3	37.7	54.3	27.3	314.9
2nd	400.0	48.9	12.6	64.0	69.8	5.0	82.1	31.6	24.4	22.0	39.6	52.2	31.4	316.4
3rd	414.3	59.0	10.9	69.7	63.7	5.0	84.2	33.3	22.8	20.8	44.9	53.1	31.3	329.9
4th	422.0	57.4	12.8	70.4	56.6	5.5	91.1	37.6	21.9	20.3	48.4	54.2	31.3	336.5
1977 1st qtr	418.5	62.5	10.7	65.8	55.8	5.3	90.2	34.1	22.0	21.8	50.3	52.1	35.4	331.0
2nd	432.9	74.1	11.7	71.3	48.2	6.4	93.1	31.5	22.4	22.3	51.9	55.9	40.2	336.8
3rd	455.9	74.7	11.6	80.9	42.3	7.1	102.1	36.9	20.6	25.6	54.1	58.7	36.7	360.5
4th	456.5	65.5	14.1	79.4	47.6	7.3	95.3	44.6	21.5	24.7	56.5	62.1	37.3	357.1
1978 1st qtr	445.5	74.9	14.4	78.2	37.5	6.5	102.6	38.8	19.4	24.8	48.4	56.8	34.7	354.0

[1] These columns represent the division of the column 'metal manufacture' formerly shown .This split is only approximate because at this stage separate deflators are not available for the two industries.

Table 3 Fixed capital expenditure in the distributive and service industries (excluding shipping) at 1970 prices seasonally adjusted

£ million

Period	Total	Analysis industry group: Wholesale distribution	Retail distribution	Other industries [2]	Analysis by type of asset: New building work	Vehicles	Plant and machinery
1968	1 561 (1 554 [1]	166	283	1 112 (1 105) [1]	624	368	570 (563) [1]
1969	1 683 (1 690) [1]	160	295	1 228 (1 235) [1]	650	389	643 (650) [1]
1970	1 799	176	299	1 325	666	394	739
1971	1 922	185	333	1 405	747	367	809
1972	2 035	195	394	1 445	700	436	899
1973	2 377	194	455	1 729	764	505	1 108
1974	2 300	190	436	1 675	735	509	1 057
1975	1 921	142	369	1 411	587	402	932
1976	1 900	142	377	1 381	552	467	880
1977	2 081	148	414	1 519	541	514	1 026
1971 1st qtr	468	44	82	342	185	89	194
2nd	477	46	86	345	183	96	198
3rd	491	47	84	361	190	92	209
4th	487	48	81	358	189	90	208
1972 1st qtr	481	48	90	343	173	101	207
2nd	512	49	95	368	175	108	229
3rd	512	46	102	365	169	112	231
4th	530	53	107	370	183	115	232
1973 1st qtr	588	50	110	428	201	123	264
2nd	588	48	116	424	193	120	275
3rd	585	47	118	420	193	131	261
4th	617	49	111	457	177	132	308
1974 1st qtr	617	51	110	456	199	134	285
2nd	578	47	106	426	184	128	266
3rd	555	50	103	402	182	124	249
4th	551	43	118	390	170	123	258
1975 1st qtr	482	39	85	358	154	106	222
2nd	484	37	92	354	152	97	235
3rd	486	33	95	358	142	97	246
4th	469	32	96	341	140	102	228
1976 1st qtr	448	33	95	320	135	104	208
2nd	468	35	102	331	137	117	214
3rd	488	37	92	359	142	124	222
4th	496	37	88	371	138	122	236
1977 1st qtr	502	32	107	363	131	122	249
2nd	508	36	103	369	130	129	250
3rd	530	41	110	380	142	136	251
4th	541	39	94	407	138	127	276
1978 1st qtr	548	35	115	398	133	141	274

[1] See footnote to table 1. [2] Including leasing, on the basis of the ownership of assets.

Table 4 Fixed capital expenditure at current prices of manufacturing, distributive and service industries

£ million

Period	Total	Manufacturing industry	Distributive and service industries (excluding shipping	Shipping industry
1966	2 787	1 517	1 172	99
1967	2 861	1 485	1 236	140
1968	3 304	1 639	1 418	247
1969	3 629	1 822	1 589	217
1970	4 294	2 130	1 799	364
1971	4 648	2 187	2 078	384
1972	4 971	2 044	2 373	553
1973	6 008	2 286	3 088	635
1974	7 400	3 150	3 639	611
1975	7 821	3 461	3 795	565
1976	8 642	3 957	4 292	393
1977	10 759	4 879	5 303	577
1973				
1st qtr	1 437	542	729	166
2nd	1 366	508	739	118
3rd	1 449	596	744	109
4th	1 757	640	875	242
1974				
1st qtr	1 677	712	875	90
2nd	1 695	707	863	125
3rd	1 859	797	890	173
4th	2 169	935	1 011	223
1975				
1st qtr	1 865	846	878	142
2nd	1 867	818	910	138
3rd	1 965	855	962	148
4th	2 125	941	1 045	138
1976				
1st qtr	1 977	915	952	110
2nd	1 943	889	1 010	45
3rd	2 237	998	1 091	148
4th	2 485	1 155	1 239	92
1977				
1st qtr	2 426	1 105	1 192	129
2nd	2 453	1 112	1 235	107
3rd	2 733	1 245	1 347	142
4th	3 147	1 418	1 530	199
1978				
1st qtr	2 859	1 305	1 454	100

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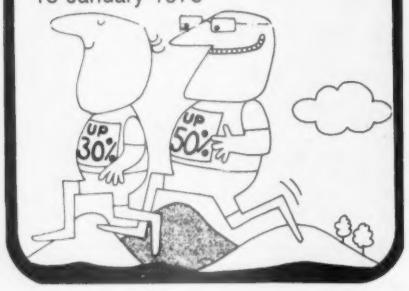

Manufacturers' and distributors' stocks: first quarter

Revised figures indicate that the level of stocks held by manufacturers, wholesalers and retailers rose by about £240 million, at 1970 prices, seasonally adjusted, in the first quarter of 1978, £70 million more than estimated on provisional figures.

Manufacturing industry

The revised estimate for the increase in manufacturers' stocks in the first quarter is about £120 million, considerably more than the provisional estimate and now spread almost equally over the three groups of assets. The main revision relates to work in progress, which on provisional figures was thought to have fallen slightly.

All industry groups except metals showed an increase in stocks. For the food, drink and tobacco, the chemicals and the residual 'other manufacturing' industries this amounted to about 3 per cent of the opening level while for the engineering and textiles groups of industries it amounted to under 1 per cent.

With the greater rise in stocks, the stocks/output ratio now shows a rise during the quarter, from a revised end December level of 107.4 to an end March level of 107.7.

Distributive industries

Revised figures confirm that wholesalers' stocks increased by about £50 million, at 1970 prices, seasonally adjusted, in the first quarter

Table 1 Value of physical increase in industry's stocks at 1970 prices seasonally adjusted

£ million

	Total	Manufacturing	Wholesaling	Retailing
Level of stocks at end 1977	14 646	10 762	1 938	1 946
1970	377	325	68	−16
1971	−78	−148	52	18
1972	−82	−145	48	15
1973	1 078	597	102	379
1974	606	634	81	−109
1975	−605	−429	−111	−65
1976	37	5	23	9
1977	359	234	108	17
1970				
1st qtr	33	47	4	−17
2nd	144	117	21	6
3rd	93	75	17	1
4th	107	87	27	−17
1971				
1st qtr	13	13	14	14
2nd	−53	−89	28	9
3rd	−17	−40	13	11
4th	−21	−31	−2	12
1972				
1st qtr	53	83	21	8
2nd	21	−60	2	41
3rd	−22	−21	14	−15
4th	15	19	15	−19
1973				
1st qtr	330	199	39	92
2nd	381	166	7	209
3rd	181	111	30	40
4th	185	121	26	38
1974				
1st qtr	69	71	21	−20
2nd	284	211	48	25
3rd	345	377	5	37
4th	86	117	6	77
1975				
1st qtr	98	31	23	−44
2nd	186	74	−51	−61
3rd	218	209	26	16
4th	−103	−115	−12	24
1976				
1st qtr	59	—	26	33
2nd	−131	−66	−20	−45
3rd	28	−2	14	16
4th	81	73	3	5
1977				
1st qtr	277	125	51	102
2nd	199	164	39	−5
3rd	70	31	5	−44
4th	48	25	13	−36
1978				
1st qtr (r)	239	125	53	61

Table 2 Value of the physical increase of stocks held by manufacturing industry at 1970 prices seasonally adjusted

£ million

	Analysis by industry group							Analysis by type of asset		
	All manufacturing industries	Food, drink and tobacco	Chemicals, coal and petroleum products	Metal manufacture	Engineering, shipbuilding, vehicles and metal goods	Textiles, leather and clothing	Other manufacturing industries	Materials and fuel	Work in progress	Finshed goods
Level of stocks at end 1977	10 762	1 349	1 153	909	5 361	875	1 115	3 575	4 151	3 036
1970	325	11	43	50	222	1	−1	113	122	90
1971	−148	11	17	5	−164	−14	−3	−146	−98	96
1972	−145	20	3	−44	−85	−53	15	−41	32	−136
1973	597	75	95	−8	358	12	65	303	324	−30
1974	634	75	155	26	261	41	76	287	86	262
1975	−429	−99	−44	39	−149	−39	−137	−391	−118	80
1976	5	−1	54	83	−103	−25	−4	−61	10	56
1977	234	22	7	−8	145	29	39	32	68	133
1970										
1st qtr	47	6	19	−11	15	9	8	13	—	33
2nd	117	7	4	19	90	2	−5	56	59	2
3rd	75	4	1	15	48	—	−4	34	17	24
4th	87	−6	8	26	69	−11	—	10	47	30
1971										
1st qtr	13	8	−5	29	−30	8	3	−22	−25	60
2nd	−89	−5	16	−24	−42	−31	−3	−44	−62	17
3rd	−40	−11	−2	−7	−23	6	−3	−44	−4	8
4th	−31	20	9	7	−69	4	1	36	7	12
1972										
1st qtr	−83	7	15	57	19	−14	15	15	7	75
2nd	−60	16	−21	9	−65	−11	12	50	21	31
3rd	−21	−7	7	−1	−9	−16	5	2	2	22
4th	19	3	3	5	7	11	12	22	6	8
1973										
1st qtr	199	5	22	20	113	8	47	89	110	—
2nd	166	25	35	2	92	8	3	94	75	−3
3rd	111	27	21	−9	60	4	10	44	82	−14
4th	121	18	17	−22	93	9	6	77	57	−13
1974										
1st qtr	−71	24	37	57	−38	−7	29	64	24	−110
2nd	211	30	36	7	55	30	53	68	22	121
3rd	377	43	72	43	145	24	49	135	73	169
4th	117	−22	10	33	99	6	2	20	15	82
1975										
1st qtr	−31	−10	−9	47	−18	−5	−37	−136	18	88
2nd	−74	−50	−23	23	26	−17	−33	51	−22	−1
3rd	−209	−28	−25	−22	−76	−16	−42	−141	−61	−7
4th	−115	−11	14	−9	−81	−3	−25	−63	−52	—
1976										
1st qtr	—	−18	16	−11	10	12	−9	−26	12	13
2nd	−66	−6	15	12	−61	−19	−7	−28	−34	−4
3rd	−2	−1	15	44	−58	−10	7	7	−17	7
4th	73	24	7	38	7	−9	6	−15	48	40
1977										
1st qtr	125	11	18	13	70	9	26	55	44	26
2nd	164	20	8	12	82	22	22	39	−5	130
3rd	31	28	1	11	−43	−2	−3	−26	−32	27
4th	−25	−14	−20	22	36	—	−5	−36	60	−49
1978										
1st qtr (r)	125	35	34	−17	26	8	39	43	37	45

Table 3 Value of the physical increase of stocks held by wholesalers at 1970 prices seasonally adjusted

£ million

	Total wholesalers	General wholesale distributors	Dealers in coal, builders materials etc	Dealers in industrial materials and machinery
Level of stocks at end 1977	1 938	1 080	159	699
1970	68	15	—	53
1971	52	41	−3	14
1972	48	41	11	−3
1973	102	127	1	24
1974	81	6	—	75
1975	−111	−142	−13	44
1976	23	−3	11	16
1977	108	43	2	63
1970				
1st qtr	4	4	—	8
2nd	21	12	−3	12
3rd	17	−5	−1	24
4th	27	12	4	10
1971				
1st qtr	14	1	1	14
2nd	28	22	—	6
3rd	13	11	1	2
4th	2	7	2	7
1972				
1st qtr	21	3	−2	20
2nd	−2	2	2	−6
3rd	14	23	3	−11
4th	15	13	9	−6
1973				
1st qtr	39	40	−6	5
2nd	7	14	4	−12
3rd	30	40	2	−13
4th	26	32	−1	−4
1974				
1st qtr	21	23	−1	−1
2nd	48	22	2	24
3rd	5	−21	−3	29
4th	6	−18	2	22
1975				
1st qtr	−23	−44	2	19
2nd	−51	−53	−8	10
3rd	−26	−25	−5	4
4th	−12	−20	−2	10
1976				
1st qtr	26	14	13	−1
2nd	−20	3	−6	−17
3rd	14	−11	6	19
4th	3	−10	−2	14
1977				
1st qtr	51	24	6	21
2nd	39	24	6	10
3rd	5	7	16	29
4th	13	3	6	4
1978				
1st qtr (r)	53	21	−4	35

of 1978. This is an exceptionally large rise which was mainly attributable to a particularly big increase in the stocks held by dealers in industrial materials and machinery, whilst the rise in stocks held by general wholesale distributors was not exceptional. Stocks held by dealers in coal, builders' materials, etc, declined slightly in the first quarter. Retailers' stocks increased by about £60 million, at 1970 prices, seasonally adjusted, in the first quarter.

Inquiries: 01-215 3176/3345/5215.

Table 4 Increase in the book value of manufacturers' and distributors' stocks

£ million

	Total	Manufacturing	Wholesaling	Retailing
Level of stocks at end 1977	39 198	29 564	5 217	4 417
1970	1 302	1 038	162	102
1971	764	471	160	133
1972	949	618	217	114
1973	3 646	2 571	593	481
1974	6 330	5 132	779	419
1975	3 227	2 568	212	447
1976	6 126	4 787	873	466
1977	4 555	3 222	715	618
1970				
1st qtr	323	288	16	18
2nd	351	293	26	33
3rd	267	174	78	15
4th	362	284	43	36
1971				
1st qtr	259	211	29	20
2nd	294	180	60	54
3rd	112	28	70	13
4th	99	53	—	46
1972				
1st qtr	90	60	5	26
2nd	197	113	25	59
3rd	251	148	106	−3
4th	412	298	82	32
1973				
1st qtr	659	487	71	101
2nd	739	554	88	96
3rd	1 018	664	239	115
4th	1 230	867	194	169
1974				
1st qtr	1 763	1 501	204	59
2nd	1 853	1 447	224	182
3rd	1 525	1 254	199	72
4th	1 188	930	152	106
1975				
1st qtr	978	933	16	61
2nd	627	608	20	38
3rd	541	262	124	154
4th	1 081	764	123	194
1976				
1st qtr	1 058	879	124	55
2nd	1 263	1 125	147	−9
3rd	1 662	1 155	340	168
4th	2 142	1 628	262	252
1977				
1st qtr	1 875	1 377	203	296
2nd	1 339	980	234	125
3rd	627	376	185	66
4th	713	489	94	131
1978				
1st qtr (r)	706	561	40	105

Notes to tables 1 to 4

1 The analysis by industry group follows the standard industrial classification (1968 edition):
Manufacturing orders III to XIX.
Distributive trades order XXII:

Wholesale MLH 810, 811, 812, 831, 832 (except leasing by finance houses)
Retail MLH 820, 821.

2 Book values exclude VAT. Purchase tax payable on retailer's stock prior to the second quarter of 1973.

3 The estimates are shown to the nearest £ million but should not be regarded as accurate to this degree and care should be taken in using the industry figures in tables 2 and 3 because of the margin of error involved in quarterly seasonal adjustments. Difference between totals and the sum of constituent parts are due to rounding.

r Revised. p Provisional.

Table 5 Relationship of manufacturers' stocks to manufacturing production

Index numbers – 4th qtr 1969 100
Seasonally adjusted

	Stock levels at 1970 prices	Production (with 1970 net output weight)	Ratio of stocks to production
1967			
1st qtr	94	89	105.4
2nd qtr	94	90	104.6
3rd	94	90	104.5
4th	94	92	102.6
1968			
1st qtr	93	94	98.8
2nd	94	96	98.4
3rd	96	96	99.5
4th	97	97	99.8
1969			
1st qtr	98	98	100.0
2nd	99	100	98.7
3rd	99	100	99.5
4th	100	100	100.0
1970			
1st qtr	101	100	100.9
2nd	102	100	101.7
3rd	103	100	102.2
4th	103	101	102.3
1971			
1st qtr	104	99	104.1
2nd	103	100	102.3
3rd	102	100	102.6
4th	102	99	102.7
1972			
1st qtr	101	97	103.8
2nd	100	102	98.5
3rd	100	103	97.2
4th	100	107	93.8
1973			
1st qtr	102	110	93.1
2nd	104	110	94.5
3rd	105	112	94.2
4th	107	111	95.7
1974			
1st qtr	106	107	98.9
2nd	108	111	97.1
3rd	112	111	100.6
4th	113	107	105.4
1975			
1st qtr	113	107	105.5
2nd	112	102	110.2
3rd	110	101	109.1
4th	109	101	107.1
1976			
1st qtr	109	102	106.6
2nd	108	104	104.0
3rd	108	104	103.7
4th	109	105	103.4
1977			
1st qtr	110	106	104.2
2nd	112	103	108.2
3rd	111	104	107.1
4th	111	103	107.4
1978			
1st qtr (r)	112	104	107.7

1 The index numbers of the level of stocks relate to the end of each quarter: the index of production refers to production during the quarter.
2 The 1970 index of production has been rebased on the fourth quarter of 1969 for the purpose of this table.
3 The index numbers of the stocks production ratio are calculated from unrounded estimates of the data in the previous two columns.

r Revised. p Provisional.

National Income and Expenditure Blue Book 1977

National Income and Expenditure 1966-76, prepared by the Central Statistical Office, contains detailed estimates of national product, income and expenditure for the United Kingdom. The 1977 edition covers mainly the years 1966-76.

It contains information on personal income and expenditure, company income and its appropriation, public corporations, central and local government, investment and capital stock, output and expenditure at constant prices and other subjects. Definitions and detailed notes, which update **National Accounts Statistics: Sources and Methods** (HMSO 1968), are also included.

Price £3.95 (by post £4.24)
HMSO, PO Box 569, London SE1 9NH ISBN 0 11 630168 6

Analysis of large listed companies' accounts: financial year 1976/77

The tables below summarise the published 1976 accounts of nearly 1100 large listed companies engaged mainly in the United Kingdom in manufacturing, distribution, construction, transport, property and certain other services. The tables are derived from a regular analysis of company accounts carried out by the Economics and Statistics Division 6A of the Departments of Industry, Trade and Prices and Consumer Protection, and the full results are published annually in Business Monitor M3 – Company Finance[1]. The latest (ninth) edition of the Monitor gave provisional results for the 1976 accounts of nearly 850 listed companies; the tables below give the final results for some 1076 companies, of which 675 are in manufacturing industries and 70 in property-owning and managing. It should be noted that the analysis covers only companies above certain size limits and within the industrial and commercial sector (see section on coverage in the introduction to the Business Monitor) and not a representative sample of all UK companies.

The ninth edition of the Monitor also contained final 1975 figures for both listed and, separately, unlisted companies – nearly 1600 companies in all – and separate tables for listed and unlisted manufacturing, distribution and other services companies giving a run of figures from 1968 to 1974. Business Monitor M3 regularly contains industry analyses, an analysis of UK-controlled and overseas-controlled companies as well as tables of accounting ratios and size distributions. It is the main form of publication of the results of the analysis; it includes detailed notes and definitions, and a list of other sources of statistical information derived from companies' published accounts, etc. Cumulative, summary figures – on the lines of those published in tables 1, 2, 3 and 4 below, but not covering property companies – are published for accounts analysed each quarter, in the monthly Government Statistical Service publication *Financial Statistics*. Figures from the 1977 accounts of large listed companies analysed up to the end of March were published in the May issue of *Financial Statistics*.

The analysis of companies' accounts enables rates of return on capital employed to be calculated and information on the structure of company financing to be produced. Both these topics are the subject of annual articles in *Trade and Industry* incorporating national accounts statistics as well as data obtained from companies' published accounts. The most recent article on companies' rate of return on capital employed, covering the period 1960 to 1976, was published in the 16 September 1977 edition of *Trade and Industry* and an article on the structure of company financing, covering mainly the period since 1971, appeared in the 3 February 1978 edition.

Inquiries concerning the contents of Business Monitor M3 and the tables below should be addressed to: Economics and Statistics Division 6A, Departments of Industry, Trade and Prices and Consumer Protection, Pembroke House, 40-56 City Road, London EC1Y 2DN, tel. 01-253 9393 ext. 410.

[1] Available by subscription from HMSO, PO Box 569, London SE1 9NH (price £1.75).

Table 1 Balance sheet summary Final figures for 1976 with comparable figures for 1975

£ thousand

	Manufacturing and distribution, etc		Manufacturing industries		Property (9)	
Balance sheet at end of accounting year	1975	1976	1975	1976	1975	1976
Fixed assets						
Tangible fixed assets, net (1)	24 634 311	27 537 920	17 070 348	19 273 246	4 454 440	4 392 981
Of which: Land and buildings	12 821 927	13 938 596	7 675 775	8 388 611	3 985 750	4 000 827
Classified other than land and buildings	10 681 105	12 228 237	8 429 399	9 638 931	24 824	27 329
Assets in course of construction	448 479	578 423	282 374	453 040	443 866	364 825
Unclassified	682 800	792 664	682 800	792 664	—	—
Goodwill	2 405 639	2 380 373	1 679 584	1 660 659	38 434	32 310
Investment in unconsolidated subsidiaries	214 872	297 441	158 205	221 318	1 772	6 245
Total fixed assets, net (1)	27 254 822	30 215 734	18 908 137	21 155 223	4 494 646	4 431 536
Current assets						
Stocks and work in progress	18 036 900	21 779 122	14 313 737	17 148 558	370 662	359 989
Trade and other debtors, etc	14 607 298	17 879 786	11 215 370	13 853 395	162 950	186 939
Investments						
British government securities (2)	31 422	104 100	30 934	94 219	212	3 088
Loans to local authorities (2)	4 744	5 249	4 744	5 249	—	2 325
Other listed securities	1 094 237	1 295 366	921 138	1 110 573	24 069	21 528
Unlisted securities	2 037 999	2 461 552	1 667 137	2 016 071	149 065	126 438
Total investments	3 168 400	3 866 258	2 623 951	3 226 103	173 346	153 379
Tax reserve certificates/deposit accounts (2)	74	2 454	74	250	30	—
Treasury bills (2)	707	17 032	707	16 189	—	—
Cash, etc	3 429 207	4 683 416	2 599 264	3 701 666	191 550	211 535
Total current assets and investments	39 242 586	48 228 068	30 753 103	37 946 161	898 538	911 842
Less current liabilities						
Bank overdrafts and loans	6 159 143	7 448 860	4 622 135	5 603 435	689 672	636 727
Short-term loans	1 941 693	2 122 560	1 313 786	1 494 807	515 469	476 414
Trade and other creditors	15 704 776	19 234 749	11 617 786	14 256 153	295 782	332 514
Dividends and interest due (3)	727 445	815 977	523 705	586 992	21 529	23 506
Current taxation (3) (4)	1 483 203	1 904 540	1 052 499	1 441 475	56 298	60 296
Total current liabilities	26 016 260	31 526 686	19 129 911	23 382 862	1 578 750	1 529 457
Net current assets	13 226 326	16 701 382	11 623 192	14 563 299	−680 212	−617 615
Total net assets (1)	40 481 148	46 917 116	30 531 329	35 718 522	3 814 434	3 813 921
Total net assets financed by						
Deferred taxation (including tax equalisation)	4 900 608	6 288 315	3 604 836	4 604 573	49 157	60 430
Long-term loans	7 326 157	8 006 564	5 577 184	6 184 972	1 659 498	1 681 205
Minority interests in subsidiaries	1 581 993	1 870 141	1 341 779	1 617 360	68 043	69 295
Shareholders' interest:						
Ordinary shares	7 846 566	8 322 731	5 863 156	6 259 340	395 878	409 085
Preference shares	445 917	454 451	324 184	332 704	6 939	6 912
Capital and revenue reserves	18 379 907	21 974 914	13 820 190	16 719 573	1 634 919	1 586 994
Total shareholders' interest	26 672 390	30 752 096	20 007 530	23 311 617	2 037 736	2 002 991
Accumulated depreciation on fixed assets (1)	13 504 579	15 571 360	11 333 063	13 025 899	35 822	38 990

See notes following table 4, page 54.

Table 2 **Income and appropriation account** Final figures for 1976 with comparable figures for 1975

£ thousand

Accounting year	Manufacturing and distribution, etc		Manufacturing industries		Property (9)	
	1975	1976	1975	1976	1975	1976
Income from trading and other activities						
Gross trading profit (6)	8 612 146	11 232 973	6 348 701	8 493 654	231 845	281 208
Interest on short-term loans (3) (2)	−1 034 641	−1 093 195	−754 805	−804 035	−140 174	−133 378
Hire of plant and machinery	−412 880	−487 719	−242 234	−300 209	−1 769	−1 982
Income from listed securities	110 303	119 663	98 207	104 118	1 631	1 739
Income from unlisted securities	441 016	640 411	333 645	494 619	17 830	26 539
Prior year adjustments other than tax	3 229	6 768	873	2 813	4 180	730
Other revenue income	49 061	65 149	49 016	64 244	184	425
Gross income	7 768 234	10 484 050	5 833 403	8 055 204	113 727	175 281
Other capital receipts	195 934	404 213	166 625	363 875	1 194	1 756
Total	**7 964 168**	**10 888 263**	**6 000 028**	**8 419 079**	**114 921**	**177 037**
Appropriation of income from trading and other activities						
Depreciation provisions	2 085 380	2 413 858	1 615 769	1 860 877	9 974	11 885
Amounts written off	69 912	110 926	36 386	73 549	9 672	9 467
Taxation:						
Current UK taxation (3)	1 186 276	1 390 114	784 796	958 715	34 850	37 532
Overseas taxation	613 691	859 744	544 159	777 181	3 391	4 064
Transfer to deferred taxation	912 693	1 387 712	679 558	1 025 572	4 069	6 795
Prior year tax adjustments	−61 980	−41 119	−46 692	−28 113	−2 210	−2 120
Total taxation	2 650 680	3 596 451	1 961 821	2 733 355	40 100	46 271
Interest on long-term loans (3)	578 691	637 905	442 230	493 307	125 801	135 039
Dividends (3):						
Ordinary	1 019 386	1 203 294	747 326	888 590	27 900	31 953
Preference, etc	21 000	21 672	15 194	15 949	250	252
Asset renewals and replacement reserve	60 973	76 956	57 417	73 768	117	134
Retained profits and other capital receipts	1 478 146	2 827 201	1 123 885	2 279 684	−98 893	−57 964
Total	**7 964 168**	**10 888 263**	**6 000 028**	**8 419 079**	**114 921**	**177 037**

See notes following table 4, page 000.

Table 3 **Sources and uses of funds** Final figures for 1976 with comparable figures for 1975

£ thousand

Accounting year	Manufacturing and distribution, etc		Manufacturing industries		Property (9)	
	1975	1976	1975	1976	1975	1976
Sources of funds						
Proceeds from issue of share and loan capital						
For cash:						
Ordinary shares	718 771	861 360	563 958	753 528	22 577	−78
Preference, etc shares	−9 016	365	−8 715	−693	—	−24
Long-term loans	328 980	404 316	297 111	346 198	116 531	3 021
Total for cash	1 038 735	1 266 041	852 354	1 099 033	139 108	2 919
In exchange for subsidiaries:						
Ordinary shares	46 960	115 953	36 063	74 398	1 141	1 731
Preference, etc shares	681	7 385	681	7 385	—	—
Long-term loans	37 594	17 190	34 386	16 934	181	—
Total in exchange for subsidiaries	85 235	140 528	71 130	98 717	1 322	1 731
Total receipts from issues	**1 123 970**	**1 406 569**	**923 484**	**1 197 750**	**140 430**	**4 650**
Increase in amount owing to banks	−83 321	1 227 237	4 781	930 072	−24 953	−56 629
Increase in short-term loans	232 483	75 984	161 597	113 656	66 087	−49 918
Increase in trade and other creditors	1 937 951	3 514 896	1 366 815	2 721 930	19 443	30 652
Gross income from trading and other activities	7 768 234	10 484 050	5 833 403	8 055 204	113 727	175 281
Other capital receipts	195 934	404 213	166 625	363 875	1 194	1 756
Total sources of funds	**11 175 251**	**17 112 949**	**8 456 705**	**13 382 487**	**315 928**	**105 792**
Uses of funds						
Taxation payments	1 495 094	1 535 533	1 110 107	1 141 088	34 063	36 413
Divident payments (3)	940 463	1 135 634	683 851	840 176	29 050	30 890
Interest on long-term loans (3)	576 700	637 995	440 052	493 576	125 597	135 033
Total payments out of income	**3 012 257**	**3 309 162**	**2 234 010**	**2 474 840**	**188 710**	**202 336**
Expenditure on:						
Tangible fixed assets	3 573 492	4 164 632	2 634 190	3 158 018	−10 078	−111 221
Adjustments due to consolidation	−51 075	−3 428	−37 999	−6 413	38 330	−34 046
Intangible assets	22 965	14 514	19 713	6 057	−2 704	97
Acquisition of subsidiaries:						
By issue of shares and loans	85 235	140 528	71 130	98 717	1 322	1 731
By cash	300 790	388 178	249 933	258 370	14 387	1 568
Total on acquisition of subsidiaries	386 025	528 706	321 063	357 087	15 709	3 299
Other expenditure on capital account	217 711	214 064	149 988	170 718	34 852	30 315
Total expenditure on fixed assets, etc	**4 149 118**	**4 918 488**	**3 086 955**	**3 685 467**	**76 109**	**−111 556**
Increase in current assets and investments:						
Stocks	1 620 462	3 732 358	1 345 700	2 878 625	15 607	−5 420
Trade and other debtors, etc	1 201 432	3 177 187	845 208	2 589 464	−58	28 110
Investments	270 857	675 675	241 590	604 193	−17 764	−26 326
Tax reserve certificates/deposit accounts (2)	−1 101	154	−998	177	−29	−30
Cash, etc	922 226	1 299 925	704 240	1 149 721	53 353	18 678
Total increase in current assets and investments	**4 013 876**	**8 885 299**	**3 135 740**	**7 222 180**	**51 109**	**15 012**
Total uses of funds	**11 175 251**	**17 112 949**	**8 456 705**	**13 382 487**	**315 928**	**105 792**

See notes following table 4, page 54

Table 4 **Supplementary information** Final figures for 1976 and comparable figures for 1975

£ thousand/(number)

	Manufacturing and distribution, etc		Manufacturing industries		Property (9)	
Accounting year	1975	1976	1975	1976	1975	1976
Turnover (8)	94 042 705	113 294 266	65 480 226	79 186 718	820 528	1 023 772
Exports	9 415 572	12 045 016	8 590 118	10 899 508	3 765	4 235
Political contributions	851	800	699	575	32	24
Charitable contributions	9 746	11 474	7 628	8 871	306	310
Contracts for capital expenditure placed but not provided for	1 793 323	2 068 316	1 398 667	1 608 719	213 562	155 554
Aggregate remuneration paid to UK employees per year	14 298 437	i6 211 557	10 777 035	12 095 654	59 603	52 914
Average number of employees per week in UK	(5 737 649)	(5 618 252)	(4 168 589)	(4 034 528)	(26 457)	(22 804)

Notes:
1 Net of accumulated depreciation.
2 So far as recorded separately.
3 See notes in Business Monitor M3 for fuller details.
4 All corporation tax is classed as a current liability irrespective of the date on which it is payable.
5 Immediate assets are current assets (including investments) less stocks and work in progress.
6 After charging directors' fees and emoluments, pensions to past directors, superannuation payments, compensation for loss of office, auditors' fees and any exceptional expenditure (eg on reorganisation of closure), but excluding any profit or loss on disposal of assets and before allowing for depreciation provisions.
7 Interest on bank overdrafts and loans and other short-term loans.
8 Turnover excludes inter-group sales but includes sales by overseas subsidiaries.
9 Property is not included in the total for manufacturing and distribution, etc.

Table 5 **Various accounting ratios 1960-76**

	Average net assets (1)	Net income (2)	Ratio of net income to average net assets	Dividends declared and interest on long-term loans (3)		Turnover (4)	Gross trading profit (net of short-term interest) (5)	Ratio of gross trading profit to turnover
					Ratio to average net assets			
	£ thousand	£ thousand	per cent	£ thousand	per cent	£ thousand	£ thousand	per cent
Manufacturing and distribution, etc								
1960	12 645 339	2 020 106	16.0	801 548	6.3	..	2 415 420	..
1961	13 680 762	1 905 307	13.9	830 541	6.1	..	2 344 099	..
1962	14 609 360	1 856 406	12.7	872 077	6.0	..	2 346 530	..
1963	15 609 022	2 104 941	13.5	965 583	6.2	..	2 654 267	..
1964	17 014 990	2 390 245	14.0	1 081 475	6.4	..	3 006 002	..
1964	16 849 563	2 482 270	14.7	1 112 170	6.6	..	3 115 547	..
1965	18 238 649	2 529 562	13.9	1 193 037	6.5	..	3 227 105	..
1966	19 266 278	2 375 237	12.3	1 166 665	6.1	..	3 160 767	..
1967	19 441 962	2 419 045	12.4	1 139 333	5.9	..	3 208 156	..
1968	20 112 679	2 849 960	14.2	1 213 970	6.0	..	3 710 683	..
1969	20 915 668	2 886 414	13.8	1 253 390	6.0	..	3 768 394	..
1969	20 458 927	2 890 349	14.1	1 239 745	6.1	41 721 521	3 867 737	9.3
1970	21 613 121	2 827 694	13.1	1 275 090	5.9	46 097 511	3 884 458	8.4
1971	23 367 476	3 280 920	14.0	1 425 981	6.1	48 532 291	4 482 381	9.2
1972	26 032 375	4 280 247	16.4	1 543 255	5.9	54 662 747	5 571 603	10.2
1973	30 151 911	5 434 746	18.0	1 356 643	4.5	66 755 806	6 837 712	10.2
1974	34 062 107	5 552 617	16.3	1 426 792	4.2	80 898 438	7 065 294	8.7
1974	34 311 762	5 605 178	16.3	1 460 767	4.3	80 728 132	7 125 531	8.8
1975	38 684 224	5 725 513	14.8	1 624 074	4.2	94 303 693	7 630 462	8.1
1976	44 004 574	8 070 192	18.3	1 862 871	4.2	113 294 266	10 139 778	8.9
Manufacturing industries								
1960	10 636 469	1 672 361	15.7	650 891	6.1	..	2 009 880	..
1961	11 503 555	1 544 393	13.4	670 506	5.8	..	1 917 517	..
1962	12 271 632	1 479 344	12.1	699 794	5.7	..	1 896 584	..
1963	13 030 698	1 679 018	12.9	773 669	5.9	..	145 182	..
1964	14 223 946	1 916 416	13.5	868 888	6.1	..	2 437 667	..
1964	13 800 080	1 955 852	14.2	881 913	6.4	..	2 482 379	..
1965	14 852 459	1 991 341	13.4	943 504	6.4	..	2 565 264	..
1966	15 724 285	1 850 103	11.8	918 922	5.8	..	2 496 911	..
1967	15 747 390	1 872 228	11.9	890 194	5.6	..	2 507 165	..
1968	16 343 390	2 242 378	13.7	962 846	5.9	..	2 942 466	..
1969	17 111 500	2 242 685	13.1	991 149	5.8	..	2 965 181	..
1969	16 058 358	2 139 006	13.3	927 561	5.8	28 480 422	2 893 583	10.2
1970	16 934 764	2 050 375	12.1	950 253	5.6	31 340 604	2 889 720	9.2
1971	18 139 234	2 372 622	13.1	1 058 171	5.8	33 181 157	3 317 380	10.0
1972	19 472 814	2 999 550	15.4	1 123 924	5.8	36 752 820	3 999 824	10.9
1973	22 261 425	3 931 566	17.7	991 823	4.5	45 898 255	4 961 211	10.8
1974	25 178 741	4 161 957	16.5	1 046 819	4.2	56 059 855	5 270 540	9.4
1974	25 525 192	4 245 293	16.6	1 072 215	4.2	56 026 866	5 352 407	9.6
1975	29 140 785	4 261 807	14.6	1 209 561	4.2	65 558 506	5 641 983	8.6
1976	33 404 668	6 194 327	18.5	1 397 846	4.2	79 186 718	7 689 619	9.7

Notes.
General. The above are *not* continuous series (see section on selection of panel in the introduction to Business Monitor M3 – 9th issue).
1 Net of accumulated depreciation.
2 Gross trading profit (net of short-term interest) plus investment and other revenue income and prior year adjustments other than tax, less hire of plant and machinery and depreciation provisions.
3 See notes in Business Monitor M3 for fuller details.
4 Turnover excludes inter-group sales but includes sales by overseas subsidiaries.
5 After charging directors' fees and emoluments, pensions to past directors, superannuation payments, compensation for loss of office, auditors' fees and any exceptional expenditure (eg on reorganisation or closure), but excluding any profit or loss on disposal of assets, and before allowing for depreciation provisions.

Price Index Numbers for Current Cost Accounting

Price Index Numbers for Current Cost Accounting, prepared by the Central Statistical Office, is a booklet of price indices for companies and others who wish to prepare accounts or supplementary statements on the current cost basis. It is specified as a source of indices for the United Kingdom in the interim recommendation issued in November 1977 by the Accounting Standards Committee.

It presents all the available industry and asset-specific price indices likely to be useful for revaluing fixed assets, and includes the index of the cost of new construction and the general index of retail prices.

Foreign arrivals in the United Kingdom in March

During March 1978 the number of arrivals of foreign nationals entering the United Kingdom was 707 000, according to figures released by the Department of Trade and the British Tourist Authority. This figure represents an increase of 11 per cent over the same month of 1977. Arrivals for the first quarter of the year totalled 1 558 000, an increase of 1 per cent over the corresponding period of 1977.

The increase in the figures for March, while halting the downward trend in the number of foreign arrivals which has occurredd since November 1977, will reflect the early date of Easter this year, and may therefore not represent a significant change in the underlying trend in arrivals. The figures include all nationals of the EEC countries except the Irish Republic, and all other foreign nationals, but Commonwealth citizens are excluded. The figures are based on Home Office returns of passengers entering the United Kingdom. (For details of categories included see notes 1 and 2 at the end of this article)

Arrivals of nationals of EEC countries in March were 405 000, an increase of 14 per cent on the figures for March 1977, and a marked contrast to the figures for the preceding four months. The largest increases were of German nationals (up 44 per cent), nationals of Italy (up 39 per cent) and those of the Netherlands (up 31 per cent). The only EEC country to show a reduction was France, down 27 per cent on March 1977. Total EEC arrivals for the first quarter of 1978, however, fell by 1 per cent from 839 000 in 1977 to 835 000.

The number of nationals of countries of the rest of western Europe arriving in the United Kingdom during March was 116 000 compared with 113 000 for March 1977, an increase of 2 per cent. The first increases for four months were shown in the number of arrivals of nationals of Austria (up 14 per cent) nationals of Spain (up 11 per cent) and those of Portugal (up 2 per cent). There were also increases in arrivals of nationals of Yugoslavia (up 48 per cent), and those of Switzerland (up 28 per cent). The largest appreciable reductions were of nationals of Greece and nationals of Turkey, down by 20 per cent and 30 per cent respectively. Total arrivals for the first quarter of 1978, of nationals of the rest of western Europe were 266 000 compared with 286 000 for the corresponding period of 1977. This figure represents an overall reduction of 7 per cent.

The number of nationals of the United States arriving in the United Kingdom during March, continued to increase, rising by 21 per cent to 102 000 compared with 85 000 for the equivalent month of 1977. There was also an increase of 13 per cent in the number of United States nationals arriving in the first quarter of the year from 209 000 in 1977 to 236 000.

The number of nationals of other foreign countries arriving in the United Kingdom during March, decreased by 2 per cent to 83 000, compared with March 1977. Total arrivals for the first quarter of the year of nationals of other foreign countries increased by 5 per cent from 212 000 in 1977 to 221 000. The decrease in the figures for March were mainly due to a fall in the number of arrivals of east European nationals (down 17 per cent), nationals of the Middle East (down 6 per cent) and those of north Africa (down 9 per cent) although the actual numbers involved were comparatively small. Arrivals of nationals of Latin America showed an increase, however, of 31 per cent during March, and 28 per cent overall during the first quarter of 1978, rising to 35 000 from 28 000 for the same period of 1977. The reduction in the number of arrivals of nationals of Japan continued in March, with a fall of 12 per cent compared with March 1977, and an overall fall of 7 per cent for the first quarter of 1978.

Notes

1 The figures, collected by the Home Office, record the number of journeys made, so that a person who makes more than one journey is counted on each occasion. The figures for any particular country relate not to the place from which the passenger travelled, but to the fact that he or she was a foreign national admitted on the basis of holding a passport of that country.

2 Figures for the nationals of non-EEC countries include stateless persons, while an estimated addition has been made to the Home Office figures for the appreciable number of Untied States passengers arriving via the Irish Republic. No further additions have been made for any other arrivals from the republic. All figures for non-EEC arrivals relate to visitors given leave to enter for less than 12 months, ie holidaymakers, business visitors, people coming to stay as guests of relatives or friends, other tourists, and those coming for permit-free employment for less than 12 months, and also include passengers given leave to enter for any period for the purpose of taking up a course of study. These categories comprise approximately 90 per cent of all arrivals. For EEC countries, all arrivals are shown, irrespective of the passengers' purpose of visit or expected length of stay. This follows the entry of the United Kingdom into the EEC, since when citizens of community countries are generally admitted to the United Kingdom without having to state their purpose of visit or expected length of stay.

3 Seasonally adjusted figures: Simple comparisons of monthly figures between one year and another, or between adjacent months, must be interpreted with caution. The seasonally adjusted figures may provide a better basis for comparison with other months or for judging current trends. In estimating the seasonal adjustments, allowance has been made for changes in the seasonal pattern, which have been in the direction of a spreading of the tourist season, with some reduction in the summer peak relative to the rest of the year. Adjustment was also made for the effect of the varying date of Easter on numbers of western European arrivals.

The seasonally adjusted series are liable to revision when subsequent figures become available and should therefore, for the most recent months, be viewed with caution.

Inquiries: 01-212 5555

Foreign arrivals

Thousands per month

	Total arrivals of nationals of EEC countries (excluding Irish Republic) [1]		Foreign arrivals from non-EEC countries [2]							
			Nationals of rest of western Europe (non-EEC)		Nationals of United States		Nationals of other foreign countries		Total nationals of non-EEC countries	
1968	144		34		73		29		136	
1969	174		40		95		35		170	
1970	199		47		117		41		205	
1971	214		53		129		46		228	
1972	232		59		134		51		244	
1973	265		70		131		62		263	
1974	280		75		107		68		250	
1975	314		87		99		80		267	
1976	379		113		121		89		322	
1977	438		133		144		107		383	
1977	UA	SA	UA	SA	UA	SA	UA	SA	UA	SA
January	224	423	84	144	68	142	66	100	217	385
February	260	499	89	146	56	138	61	103	206	387
March	355	423	113	139	85	136	85	106	283	381
April	495	456	149	141	123	144	79	103	352	388
May	490	447	125	141	181	152	94	107	400	400
June	489	439	157	131	231	154	128	112	516	397
July	927	457	270	135	245	141	202	111	717	387
August	669	433	155	125	212	141	181	110	548	376
September	410	419	128	121	196	134	135	105	459	360
October	395	438	131	128	158	163	99	106	387	399
November	278	430	101	123	87	136	79	114	266	373
December	266	394	90	118	83	144	74	105	246	367
1978										
January	212	402	77	131	74	152	70	106	221	389
February	217	416	73	119	60	146	68	113	201	378
March	405	437	116	125	102	162	83	103	302	390
Jan-Mar 1977	839		286		209		212		707	
Jan-Mar 1978	835		266		236		221		723	

[1] Total arrivals: All nationals of EEC countries admitted to the UK irrespective of intended length of stay or purpose excluding Irish Republic. [2] Foreign arrivals (non-EEC): Nationals of countries other than EEC or the Commonwealth admitted for less than one year for selected purposes – see note 2. UA = Unadjusted Home Office. SA = Seasonally adjusted Department of Trade.

Cost indices for the aerospace and radio, radar and electronic capital goods industries

April's cost indices for the aerospace and radio, radar and electronic capital goods industries are given in the table. Attention is drawn to the footnotes: an explanation of the compilation of the indices was given in the introductory article in *Trade and Industry*, 3 February.
Inquiries: 01-215 3514.

Cost indices for the aerospace and radio, radar and electronic capital goods industries (MLH 383 and 367 respectively) 1970 = 100

	1977									1978			
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
1 BOUGHT OUT FINISHED GOODS PURCHASED BY		p	p	p	p	p	p	p	p	p	p	p	p
Aerospace industry	256.1	259.1	259.2	261.7	261.9	264.0	267.6	272.2	273.1	275.5	277.2	280.3	285.5
Airframe sector	251.9	254.9	255.0	257.5	258.2	259.8	263.5	267.9	268.8	271.4	273.1	276.1	280.9
Aero-engine and aero-engine parts sector	259.2	262.2	262.5	265.1	265.2	267.6	270.9	275.4	276.6	279.1	280.9	284.0	289.5
Aero-engine parts sector	254.0	256.6	257.3	260.3	262.2	263.8	267.5	270.7	272.5	276.2	277.9	280.5	284.6
Aircraft component sector	261.4	264.3	264.4	267.0	266.8	269.1	272.2	276.4	277.4	279.2	281.0	284.3	289.7
2 OTHER MATERIALS PURCHASED BY													p
Aerospace industry	309.9	310.2	309.9	313.5	315.2	318.3	319.8	317.3	317.1	316.6	316.9	319.5	322.7
Airframe sector	289.9	290.7	292.0	297.3	301.2	303.4	304.8	302.9	303.6	304.0	304.5	305.9	308.4
Aero-engine and aero-engine parts sector	305.0	305.1	304.9	307.9	310.2	315.6	318.9	317.6	317.5	319.3	319.6	321.4	323.8
Aero-engine sector	328.6	328.8	327.6	330.3	330.5	333.8	335.2	332.2	331.3	330.0	330.4	334.3	338.1
Aircraft components sector	319.6	319.8	318.9	322.2	322.7	324.0	324.3	320.8	320.4	317.9	317.9	321.5	325.6
3 ALL PURCHASES OF GOODS BY		p	p	p	p	p	p	p	p	p	p	p	p
Aerospace industry	273.8	275.9	276.0	278.8	279.5	282.0	284.8	287.1	287.7	289.1	290.3	293.3	297.8
Airframe sector	260.7	263.1	263.5	266.6	268.1	269.8	273.0	275.9	275.8	278.9	280.3	283.0	287.2
Aero-engine and aero-engine parts sector	275.7	277.6	277.8	280.5	281.3	284.8	288.2	290.5	291.3	293.5	294.9	297.5	301.8
Aero-engine parts sector	284.2	285.8	285.8	288.6	289.8	292.1	294.9	295.6	296.3	298.0	299.1	302.3	306.2
Aircraft components sector	295.7	297.0	296.5	299.5	299.7	301.5	302.9	302.5	302.7	302.0	302.7	306.3	310.9
Radio, radar and electronic capital goods industry	252.5	256.5	257.1	259.6	260.8	262.1	265.2	268.2	268.2	270.5	272.0	275.2	278.6
4 SALARIES AND GENERAL EXPENSES		p	p	p	p	p	p	p	p	p	p	p	p
Aerospace industry	249.7	253.7	253.7	255,6	253.8	256.2	259.6	265.4	266.4	267.9	269.5	272.6	279.4
Airframe sector	247.8	252.0	251.8	253.6	251.6	254.2	257.7	264.0	265.1	266.5	268.4	271.5	278.3
Aero-engine and aero-engine parts sector	255.2	259.3	259.3	261.1	259.5	261.9	265.1	270.6	271.6	273.1	274.7	277.6	284.0
Aero-engine parts sector	248.2	252.1	252.4	254.4	253.0	255.4	258.6	264.1	265.1	266.7	268.3	271.5	278.0
Aircraft components sector	244.6	248.5	248.4	250.2	248.3	250.7	254.1	260.1	261.1	262.4	264.2	267.3	274.0
Radio, radar and electronic capital goods industry	230.1	234.1	233.6	235.4	233.0	235.5	239.0	245.5	246.5	247.5	249.3	252.3	259.0
5 HOURLY EARNINGS OF ADULT MANUAL WORKERS								p	p	p	p	p	p
Aerospace industry	254.2	258.3	257.2	259.0	256.0	258.9	262.9	272.3	273.6	274.7	277.1	281.1	289.9
Radio, radar and electronic capital good industry	276.7	278.4	276.0	277.3	279.3	279.4	288.3	302.0	294.4	297.6	299.7	307.1	311.8
6 COMBINED COSTS		p	p	p	p	p	p	p	p	p	p	p	p
Aerospace industry	260.2	263.5	263.2	265.4	264.4	266.9	270.2	275.5	276.4	277.7	279.4	282.7	289.0
Airframe sector	253.8	257.4	257.2	259.5	258.5	260.9	264.4	270.2	271.2	272.8	274.6	277.8	284.1
Aero-engine and aero-engine parts sector	262.6	265.9	265.7	267.8	266.8	269.8	273.2	278.5	279.5	281.1	282.8	285.9	292.1
Aero-engine parts sector	260.8	264.1	263.9	266.0	264.9	267.4	270.8	276.1	277.1	278.6	280.3	283.7	290.2
Aircraft components sector	263.2	266.4	265.9	268.0	266.4	268.8	271.8	277.0	277.8	278.4	280.1	283.6	290.4
Radio, radar and electronic capital goods industry	248.2	251.8	251.6	253.6	253.5	255.1	259.3	265.4	264.5	266.5	268.2	272.0	276.8

Definitive information on earnings for both manual and administrative, technical and clerical (ATC) workers is available only for certain months of the year – manual earnings information is available for MLH 383 for April and October but for MLH 367 in respect of October only; ATC salaries information for both industries is available for April of each year. The indices of combined costs are based on the assumption of no change in productivity.
Revisions to series brought about as a result of ATC salaries information becoming available will be shown in the article to be published on 8 December and will affect indices from May last year up to and including those of August.
Revisions to series incorporated as a result of manual earnings information from the October survey are published in the April article and these affect series from the preceding November up to and including December. The results obtained from the April aerospace survey will affect indices from last November up to and including June and will be shown in the article published on 6 October.
The cost index tables previously D1-D5 and D7 have now been redesignated sections 1 and 6 in the table.
p Provisional

London's newly expanded Gatwick Airport, looking towards the west.

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Correction

In *Trade and Industry*, 9 June, SD 5 and SD 9 should read quarterly – £1.56 each a year post free'.

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Registrations of British, community and foreign films

The following are details of films registered by the Department of Trade under the Films Acts 1960 to 1970, as amended by the European Communities Act 1972, during the week ended Friday, 30 June 1978.

BR/E indicates that the film is a British quota film, EC that the film is a quota film. The date which forms part of the registration number of each is the date on which quota life of the film expires.

Title of film	Registered no.	Playing time minutes	Date of registration	Registered in the name of	Maker's name
BRITISH					
A Lustful Lady	Br/E 39663/2/7/83	35	26 June	Watchgrove Ltd	Border Film Productions (London) Ltd
Beneath The North Sea	BR/E 39655/2/7/83	22	27 June	ITC Film Distributors Ltd	Michael Forlong Productions Ltd
Wedgewood	BR/E 39660/2/7/83	19	28 June	Cinema International Corporation (UK)	World Wide Pictures Ltd
Movietone News 2560	BR/E 39408/2/7/83	8	30 June	British Movietonews Ltd	British Movietonews Ltd
COMMUNITY					
Catherine and Co	EC 39658/2/7/83	99	28 June	Columbia-Warner Distributors Ltd	Viaduc Productions, Paris and Produzione Intercontinentale Cinematografica, Rome
FOREIGN					
Natural High – The Commodores On Tour	F 39656	11	27 June	EMI Films Ltd	Emitel, London
Battle Of The Giants	F 39657	90	28 June	Big Fight Promotions Ltd	The Big Fights Incorporated, New York
Race For Your Life, Charlie Brown	F 39659	76	28 June	Cinema International Corporation (UK)	Lee Mendelson, California
Go Tell The Spartans	F 39661	114	28 June	United Artists Corporation Ltd	Mar Vista Productions Incorporated, California
Freewheelin	F 39662	76	29 June	Enterprise Pictures Ltd	Scott Dittrich Films, California

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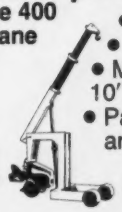

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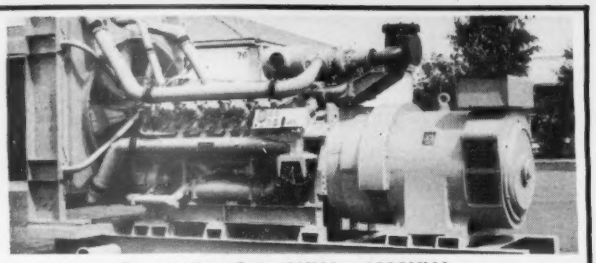

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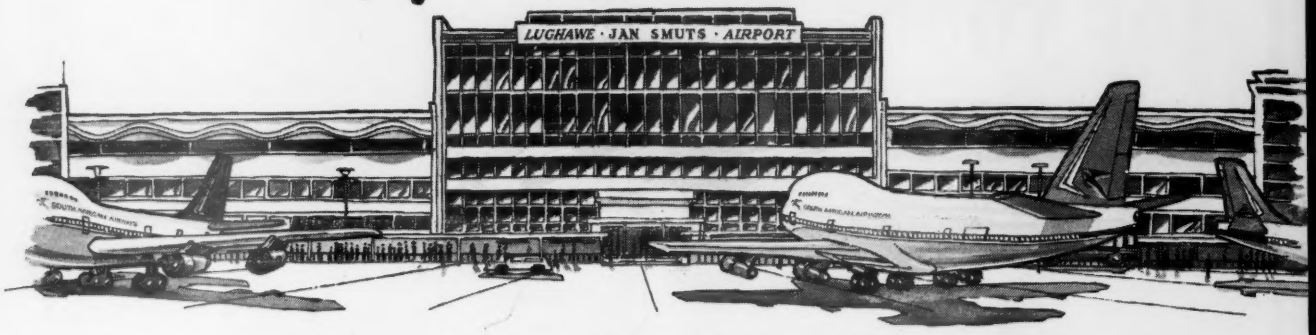

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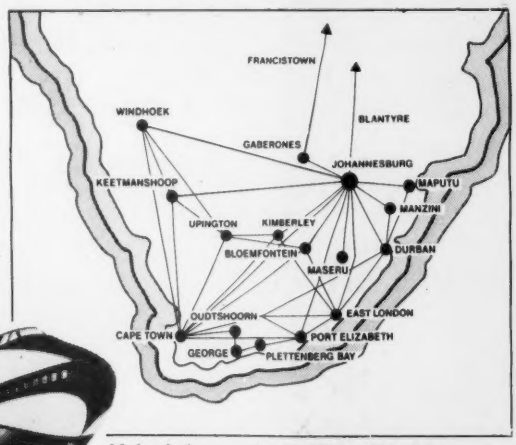

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Registered as a newspaper Published by Her Majesty's Stationery Office, Atlantic House, Holborn Viaduct, London EC1P 1BN, for the Department of Industry, 1 Victoria Street, London SW1H 0ET. Printed by The Garden City Press Limited, Pixmore Avenue, Letchworth, Herts, SG6 1JS.

ISBN 0 11 725279 4
ISSN 0006-5323